Thomson Reuters AccuDraft DocsEngine© End User Manual

Copyright 2012 Thomson Reuters

Table of Contents

Chapter I - System Overview 1

1.1 General System Overview 2
1.2 System Administrator 2
1.3 Getting Started 2

1.3.1 System Access 2
1.3.2 Logon Procedure 2
1.3.3 Main Menu Overview 3

Chapter II - New Document Creation 7

2.1 Document Groups 8
2.2 Document Types 9
2.3 Client and Document Association 9
2.4 Document Method 10
2.5 Document Name 12
2.6 The Interview 13

2.6.1 Dynamic Interview Overview 13
2.6.2 Interview Navigation 14
2.6.3 Answer Preservation 14
2.6.4 Answer Validation and Document Generation 15

Chapter III - Document Viewing 17

3.1 Document Home Page 18

3.1.1 Navigation 18
3.1.2 Document Sets: Why You See What You See 19
3.1.3 Document Sorting 20
3.1.4 Document Set Removal 20

3.2 Document Search 21
3.3 Viewing Completed Documents 23

Chapter IV - Document Management 25

4.1 Home Page Details 26
4.2 Documents in the Set 26

4.2.1 Edit Document in the Set 27
4.2.2 Changing Workflow Status 28
4.2.3 Moving Files on Document Set Page 29
4.2.4 Deleting Documents on Document Set Page 29

4.3 Details for This Set 29

4.3.1 Document Set ID 30
4.3.2 Ancillary Files 30
4.3.3 Document History and Notes 31
4.3.4 Download Answer File 32
4.3.5 Answer Summary 32
4.3.6 Notify User 33

Chapter V - Advanced Document Creation 35

5.1 Creating Patterns 36
5.2 Creating Documents from a Pattern 37
5.3 Creating Documents from an Existing Answer Set 37
5.4 Editing Patterns 38
5.5 Modifying Existing Document Sets 39

Thomson Reuters
AccuDraft
DocsEngine©

System Overview

1.1 General System Overview

Welcome to the DocsEngine system, the industry's leading online document creation and management tool. This User Guide will show you everything DocsEngine has to offer and explain how it relates to your day-to-day operations. DocsEngine gives you the flexibility to effectively create and manage documents from anywhere, at anytime. All you need is access to the Internet. Because DocsEngine is a completely internet based system, there is never any software to install on your computer. This means that there is nothing for you to maintain or update. Documents are generated in either Microsoft Word (.doc) or Adobe Acrobat (.pdf) format, which are the two most widely used document formats. This means compatibility issues are eliminated. DocsEngine is the answer "When the Words Matter."

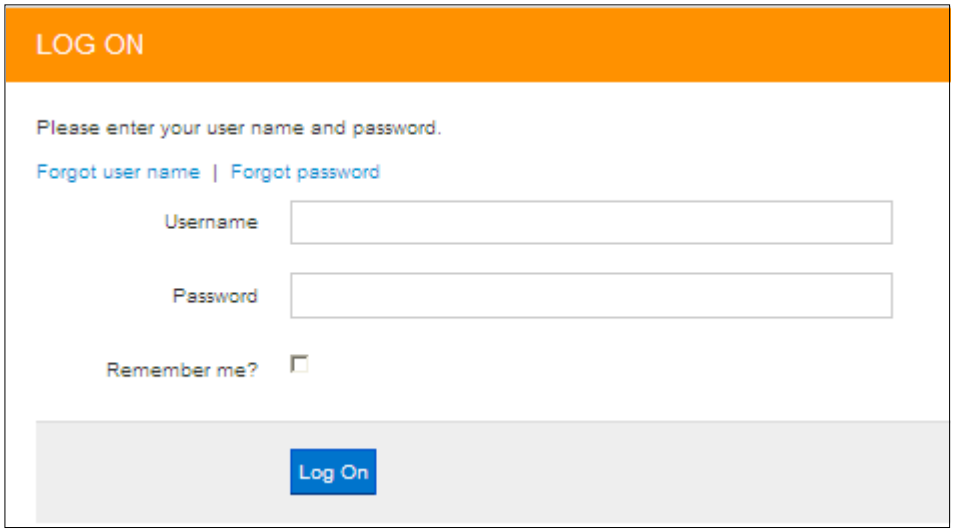
1.2 System Administrator

Each account should have at least one DocsEngine© System Administrator who has received additional training on the system. Support is always available from Thomson Reuters AccuDraft by emailing *support@accudraft.com.*

1.3 Getting Started

1.3.1 System Access

To get started, open your Internet Explorer web browser and go to www.docsengine.com and you will arrive at the system login page where you will be asked for your login information.



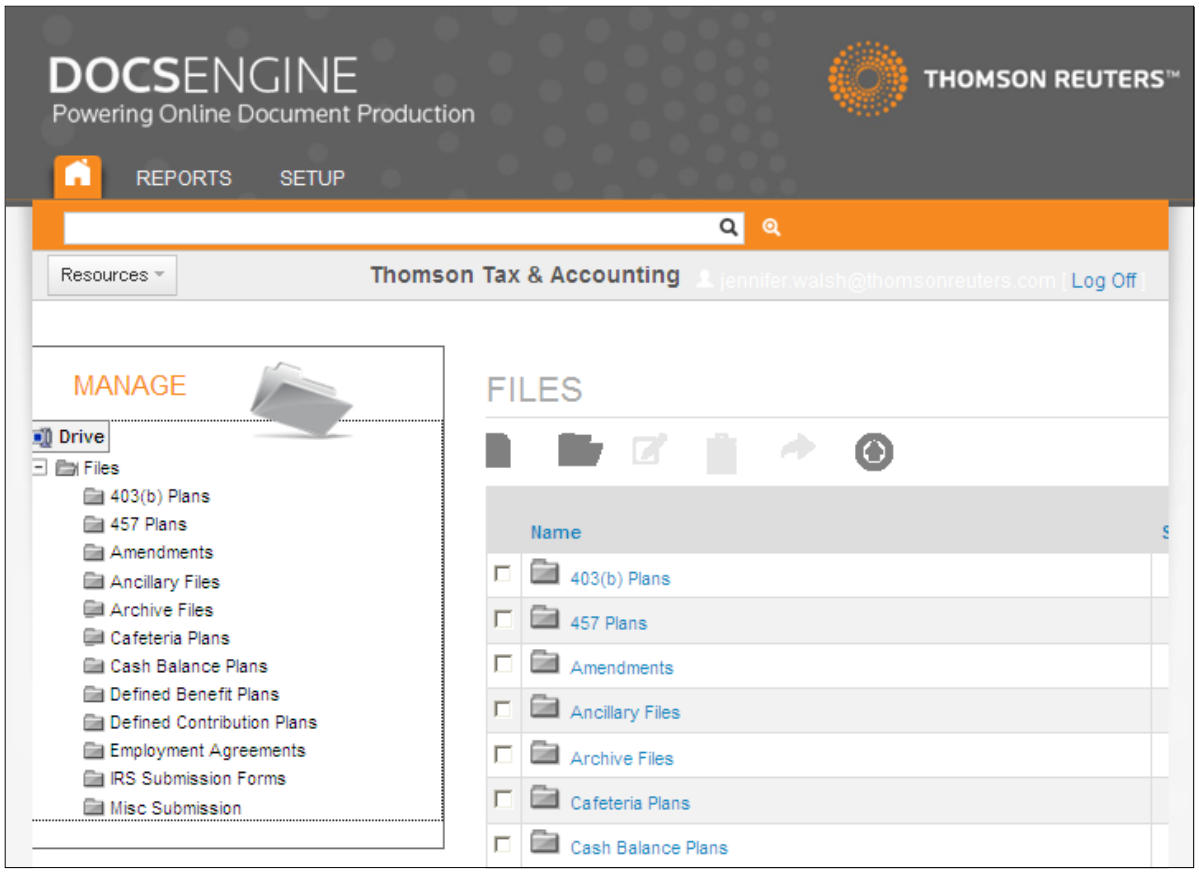
1.3.2 Logon Procedure

You log on via a secure logon process. Your User ID is an email address and your password will be assigned to you by your System Administrator. After specifying your email address and assigned password, the system will verify your identity and take you directly to the **Document Home** page. It is recommended that you do not allow Microsoft Windows to remember your login information as this could allow another individual unauthorized access to your DocsEngine account. It is also important to periodically change your password and

deactivate the accounts of terminated employees or employees who no longer need access to the document system.

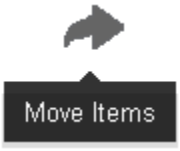
1.3.3 Main Menu Overview

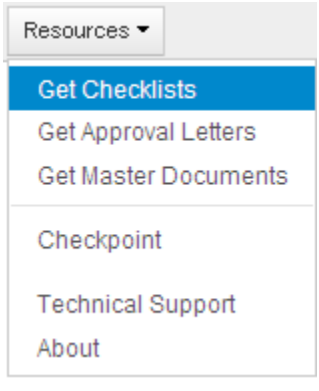
After your login information is verified you will be taken to the **Document Home** page. This is the central navigation panel that you will use to navigate through the DocsEngine system.



	Document Home: This icon in the upper left hand corner of the webpage will take you to the **Document Home** page from any other location in DocsEngine©. **Caution**: If you are in the middle of entering data for a document and select the **Document Home** icon, you will lose any data since the last time you completed a save operation.

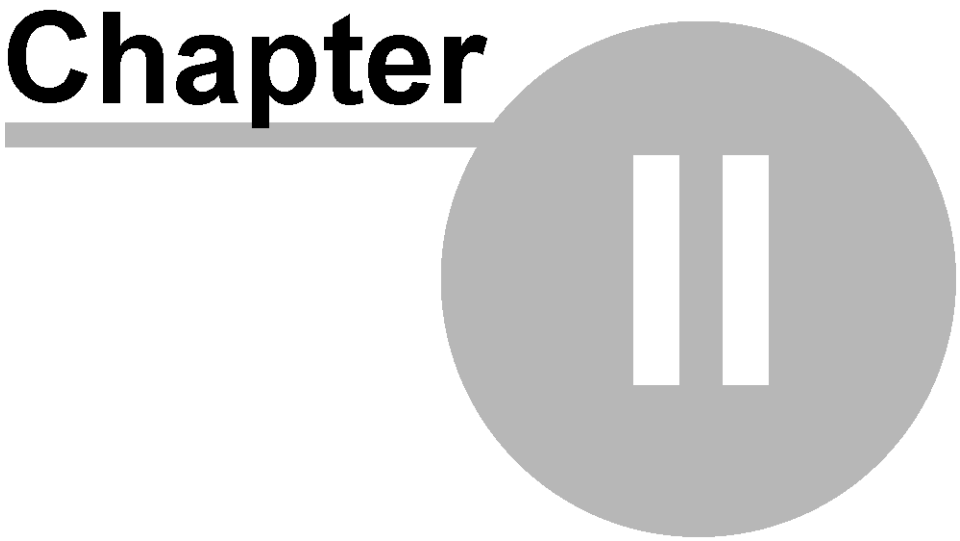
Across the center of the page you will see several icons. Below is a list of the icons and their functions.

	This icon navigates you to the **Create Document** screen. Select this icon to create a new document.
	This icon navigates you to the **New Folder** window. Select this icon to create a new folder. Creating folders allows you to organize documents based on client, type of document or other naming conventions. You can create as many folders and subfolders as you need.
	This icon navigates you to the **Edit Folder** window. Select this icon to change the name of a folder or to edit user permissions (which defines what individuals can have access to a specific folder).
	This icon navigates you to the **Delete** window. Select this icon to delete a folder or a document.
	This icon navigates you to the **Move** window. Select this icon to move documents into and out of different folders.
	This icon navigates you to the **Upload Ancillary File** window. Select this icon to upload outside documentation associated with a document created within DocsEngine. Using this feature allows you to use DocsEngine as a document management system.

	The **Resources** dropdown menu allows you to link directly to the Thomson Reuters AccuDraft website in order to retrieve copies of IRS Opinion and Advisory Letters, Document Checklists, and Base Plan Documents. You can also obtain our support contact information as well as link directly to your Thomson Reuters Checkpoint account.

SETUP	This icon will navigate you to the **Setup** page. Your firm's Thomson Reuters AccuDraft products, user information and credit card information (if applicable) are managed in this area. In addition, System Messages alerting you to important information will be posted there.
REPORTS	This icon will navigate you to the **Reports** page. This is an advanced option used if you have purchased report writing capabilities. For a detailed explanation of the functionality of this feature please contact Thomson Reuters AccuDraft Technical Support.
[Log Off]	This icon will log you out of the system. Once you click this link, the logout command will immediately be executed. **IMPORTANT**: You will lose any data since the last time you completed a save operation. Once logged out of the system, the only way to regain access is to log back in. A detailed explanation of regaining system access can be found in the "Logon Procedure" section of this manual.

Thomson Reuters
AccuDraft
DocsEngine©



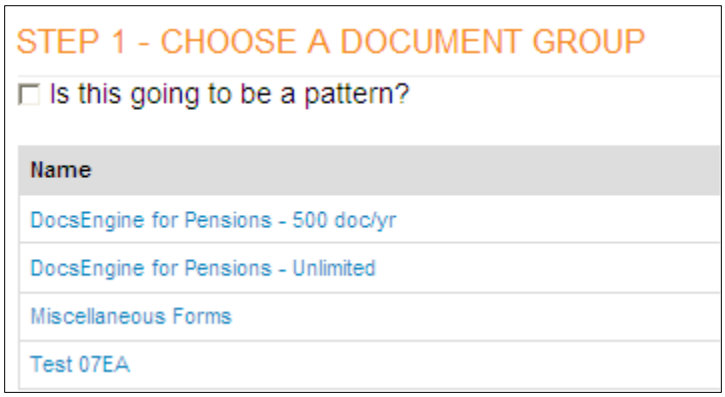
New Document Creation

2.1 Document Group(s)

Once you log into DocsEngine© using your personal log on information, you will see the main **Document Home** screen.

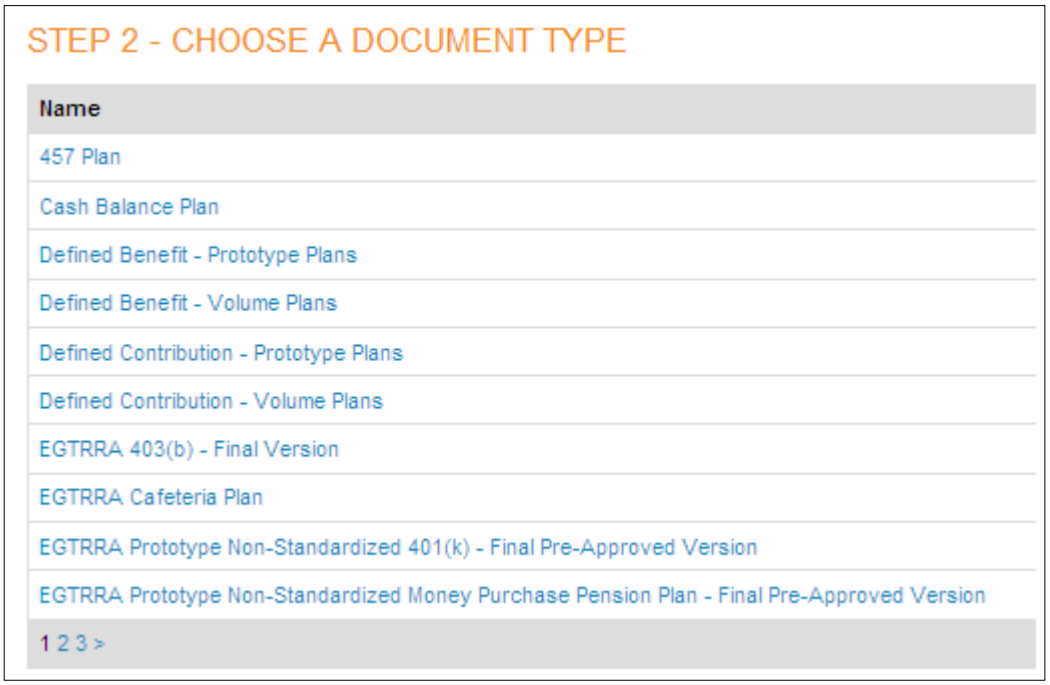
To create a new document, select the **New Document** Icon. At the **New Document** screen, you will be asked if you are creating a pattern. A pattern is a template in which you will pre-answer certain questions that will be answered the same way for more than one document. Creating a pattern will save time when you are completing subsequent interviews.

You will also be asked to choose a Document Group. A Document Group contains a logical set of document types.


STEP 1 - CHOOSE A DOCUMENT GROUP
Is this going to be a pattern?
Name
DocsEngine for Pensions - 500 doc/yr
DocsEngine for Pensions - Unlimited
Miscellaneous Forms
Test 07EA

2.2 Document Type(s)

Once you have selected a Document Group you will be asked to select a Document Type from a list of plan types. The plan types include the type of plan you wish to create (i.e. defined benefit or defined contribution) as well as document formats (i.e. volume submitter or prototype plan).

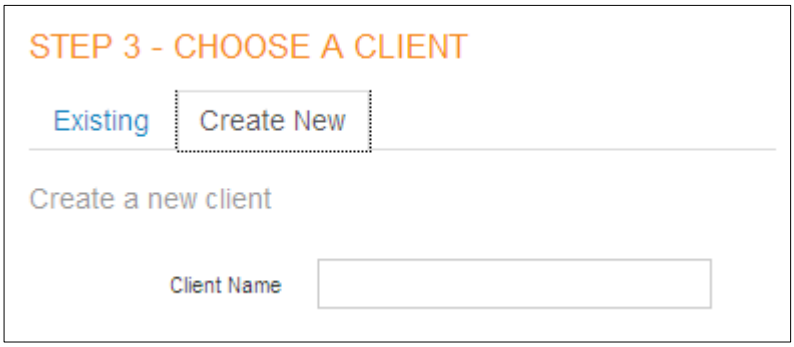

STEP 2 - CHOOSE A DOCUMENT TYPE
Name
457 Plan
Cash Balance Plan
Defined Benefit - Prototype Plans
Defined Benefit - Volume Plans
Defined Contribution - Prototype Plans
Defined Contribution - Volume Plans
EGTRRA 403(b) - Final Version
EGTRRA Cafeteria Plan
EGTRRA Prototype Non-Standardized 401(k) - Final Pre-Approved Version
EGTRRA Prototype Non-Standardized Money Purchase Pension Plan - Final Pre-Approved Version
1 2 3 >

2.3 Client and Document Association

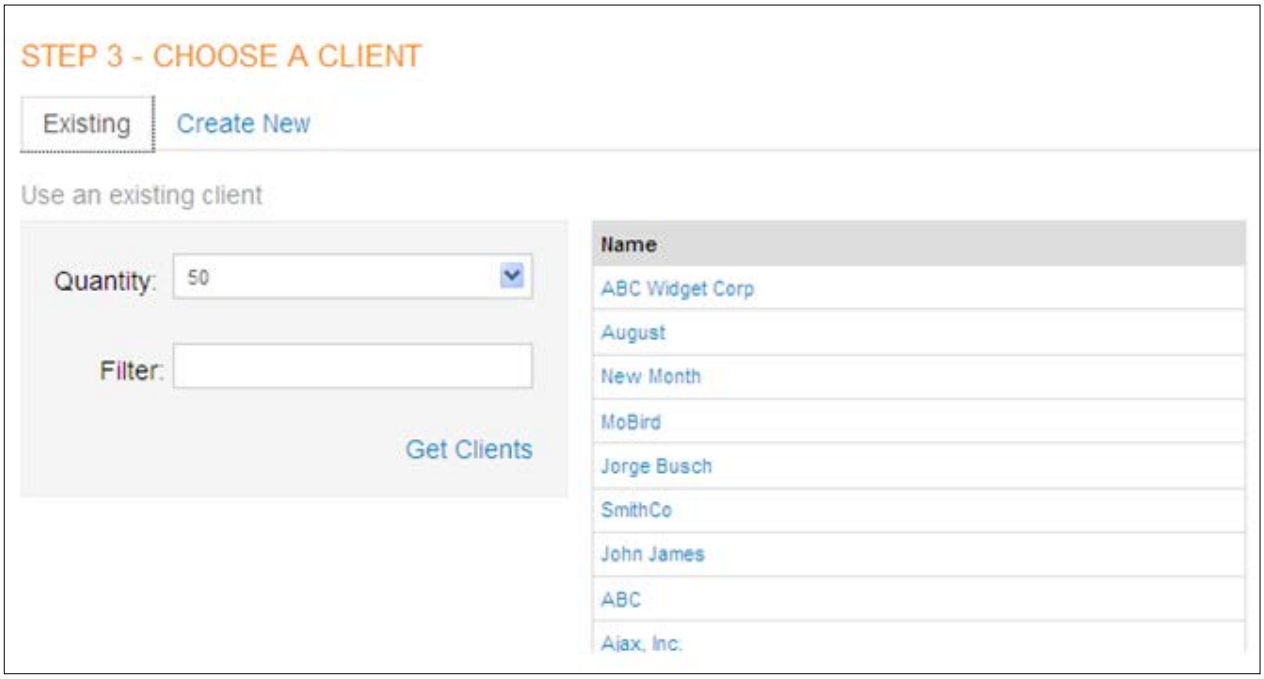
After you have selected the Document Type, you will assign a Client Identifier. You have two options:

- **Create New** – this will be selected if you are entering in a new Client Identifier.
- **Existing** – this will be selected if you will be assigning a Client Identifier that is already stored in DocsEngine©.

Create New. To create a new document for a client name not already stored in DocsEngine©, select the **Create New** link and then type the name of the client in the **Client Name** field.



Existing. If the document is being assigned to a client name that is already stored in the DocsEngine© system, select the client name from the list that will populate to the right of the field. You can use the **Filter** field to enter in all or part of the client's name. You can limit the number of returned names by selecting a quantity from the **Quantity** drop-down menu. If you do not see any entries in the **Existing Client** dialog box to the right, then you must select **Create New**.

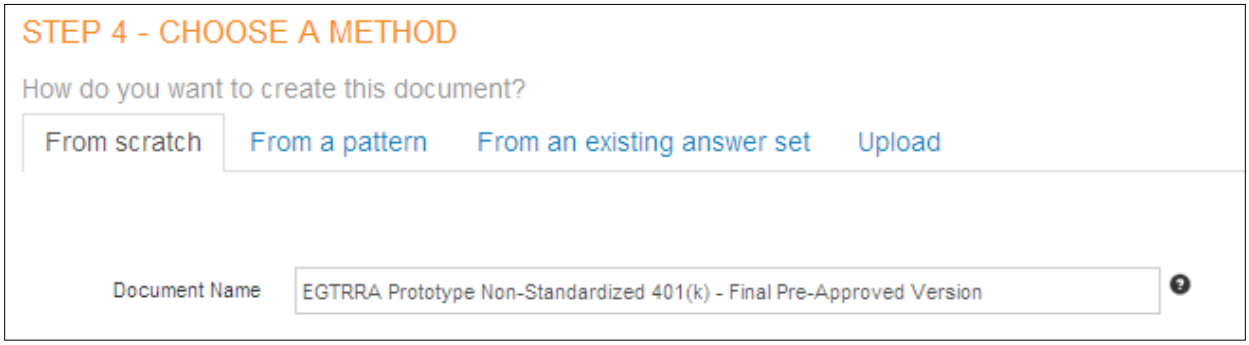


2.4 Document Method

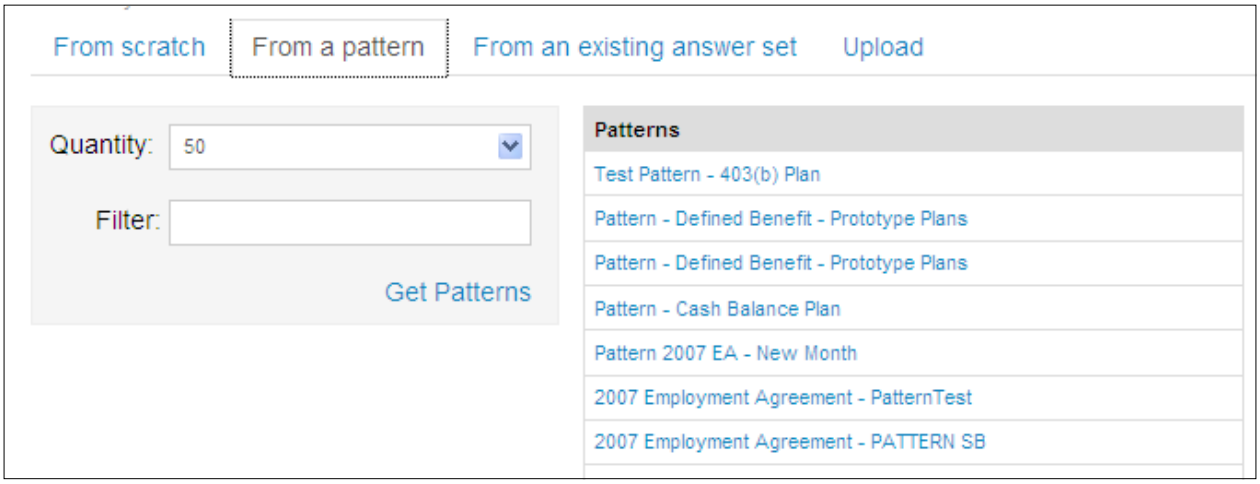
The next step is to select a Document Creation Method. You have four options:

- **From scratch**
- **From a pattern**
- **From an existing answer set**
- **Upload** answers from another answer file

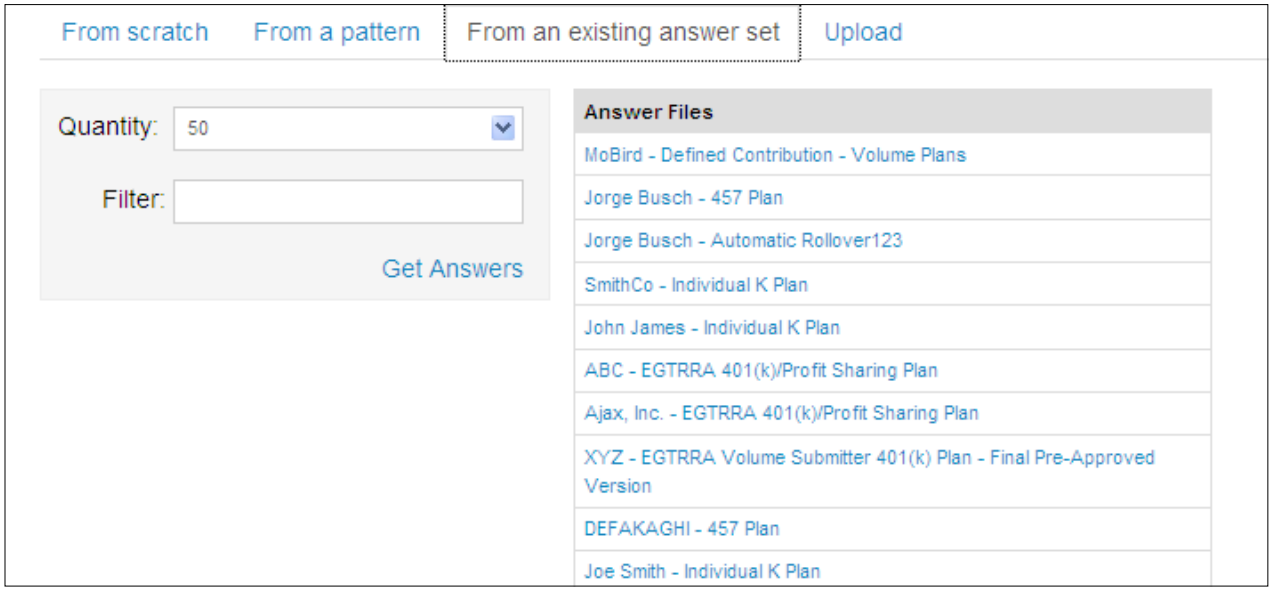
Select one of the four links across the top of the screen. If you are creating the document from scratch, you will be prompted to enter in a document name.


STEP 4 - CHOOSE A METHOD
How do you want to create this document?
From scratch
From a pattern
From an existing answer set
Upload
Document Name
EGTRRA Prototype Non-Standardized 401(k) - Final Pre-Approved Version

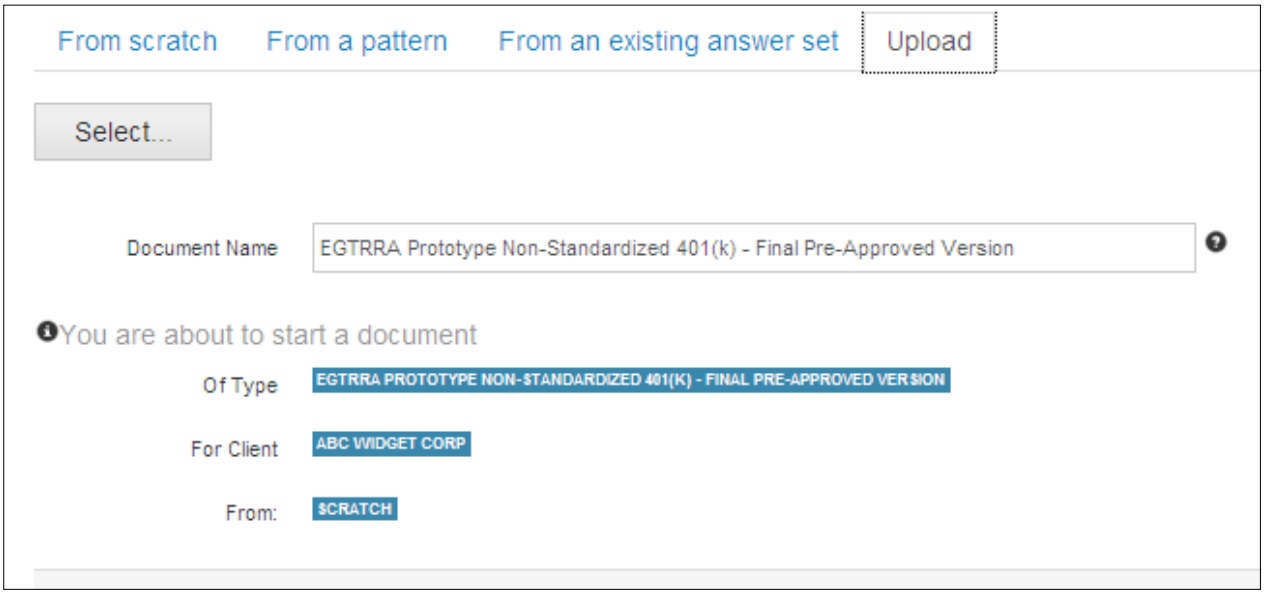
If you are creating this document from a pattern, you will be prompted to select a pattern from the list that populates to the right.

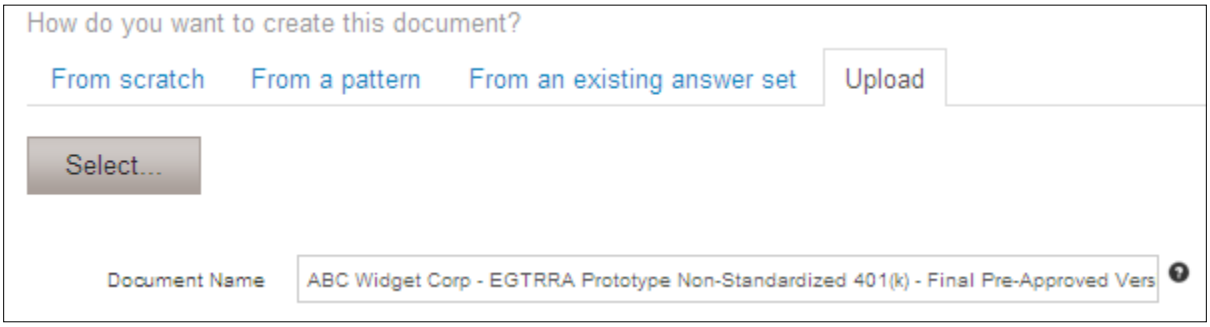


If you are creating this document from an existing answer set, you will be prompted to select an answer file from the list that populates to the right.


From scratch
From a pattern
From an existing answer set
Upload
Quantity:
50
Filter:
Get Answers
Answer Files
MoBird - Defined Contribution - Volume Plans
Jorge Busch - 457 Plan
Jorge Busch - Automatic Rollover123
SmithCo - Individual K Plan
John James - Individual K Plan
ABC - EGTRRA 401(k)/Profit Sharing Plan
Ajax, Inc. - EGTRRA 401(k)/Profit Sharing Plan
XYZ - EGTRRA Volume Submitter 401(k) Plan - Final Pre-Approved Version
DEFAKAGHI - 457 Plan
Joe Smith - Individual K Plan

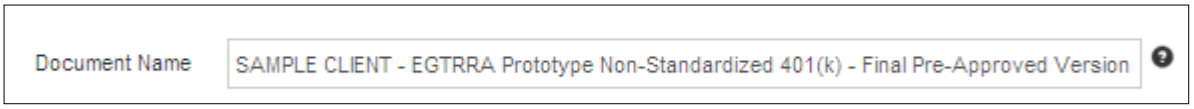
When you select the **Upload** tab and then select the **Select** icon, a window will open and you can select the file you wish to upload there.



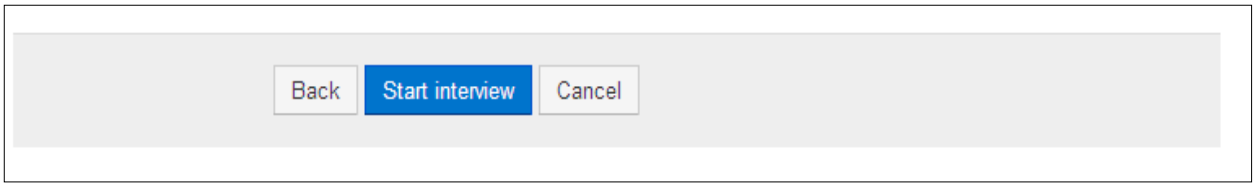

How do you want to create this document?
From scratch
From a pattern
From an existing answer set
Upload
Select...
Document Name
ABC Widget Corp - EGTRRA Prototype Non-Standardized 401(k) - Final Pre-Approved Vers

2.5 Document Name

After the Document Group, Document Type and Client Association have been specified, you will name the document. You will see that the default name is a combination of the client name–document type. You may change all or a part of the document name if you wish. The identifying name does not need to be the same as the actual name of the document.



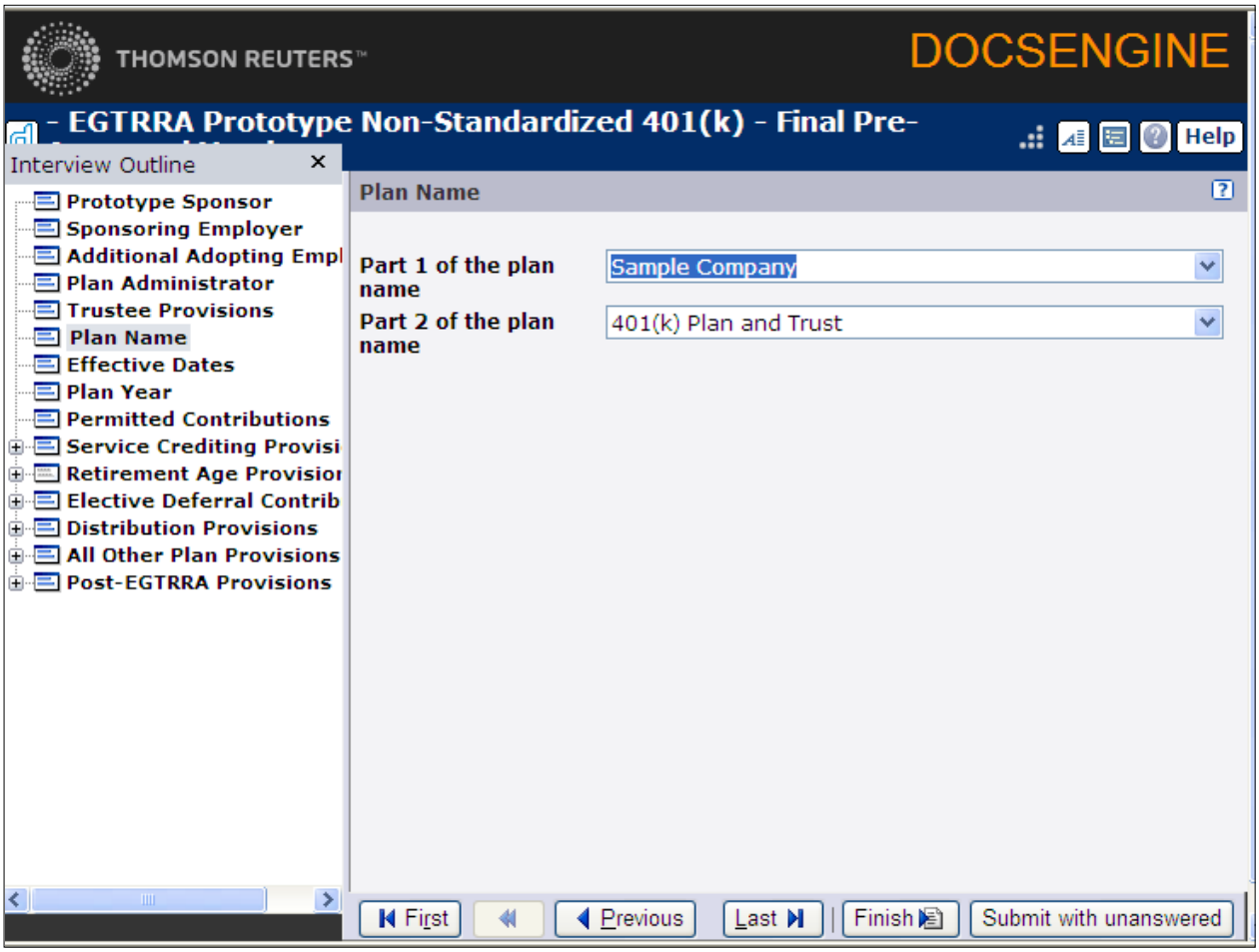
Now that the document has a name, you are ready to begin the interview. Select the blue **Start Interview** button and the document interview will load so that you may begin answering the questions.



2.6 The Interview

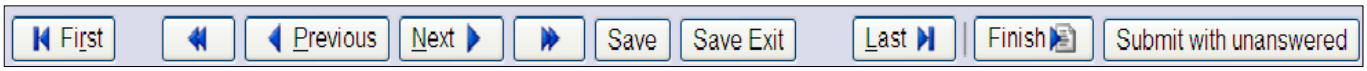
2.6.1 Dynamic Interview Overview

The questions that you will answer in order to assemble a document are arranged in what is called a dynamic interview. This means that there is a very real possibility that each time you create a document, the questions you are asked may be slightly different, or appear in a different order. This is because questions are added to or removed from the interview based on your answers to previous interview questions. This is what makes DocsEngine such a versatile system, and also serves as an important validation. The language of a document changes by just changing one answer in the interview. For a more detailed explanation on this concept please consult your System Administrator.



2.6.2 Interview Navigation

There are several different navigation tools contained within the document interview. Each navigation tool is explained in detail below:



First	Returns you to the first page of the interview
Previous	Returns you to the previous dialog screen in the interview.
Next	Advances you to the next dialog screen in the interview.
Last	Advances you to the last page of the interview.

2.6.3 Answer Preservation

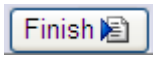
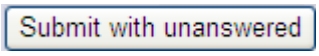
There are two answer preservation options built into the DocsEngine system:

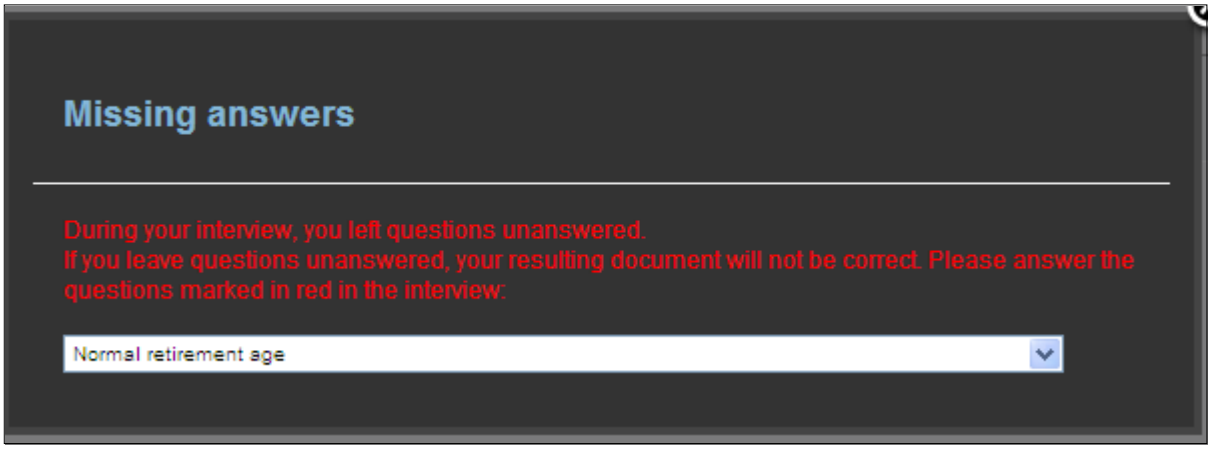
- **Save**
- **Save Exit**

Save	If selected, all responses are saved in the DocsEngine© system and you are returned to the point you were in the interview dialog. This preservation option does not take you out of the interview. This is similar to the save function in a Microsoft Windows based application.
Save Exit	If selected, all responses are saved and you are returned to the Document Home page. This is similar to closing a document and answering "yes you want to save your work" when exiting a Microsoft Windows based application.

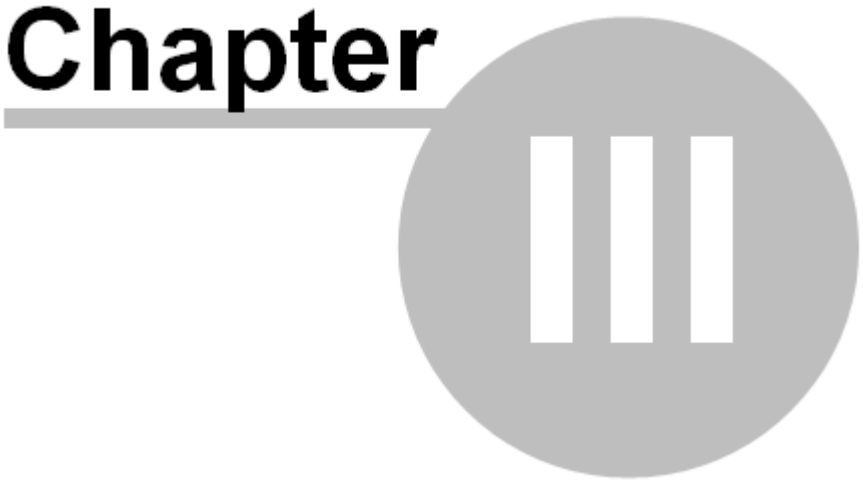
2.6.4 Answer Validation and Document Generation

The DocsEngine system incorporates a system of checks and balances that will not allow you to create an invalid document.

	When you are ready to create the final document, select **Finish**. Select this option only if you are confident that you have answered all the questions in the interview. Selecting Finish executes a document validation. DocsEngine will then run numerous validation checks on your submitted interview to ensure that the document you are creating will be accurate and complete. If the system finds questions that were left unanswered, they will be displayed in a **Missing Answers** window.
	Select **Submit with Unanswered** if you have not answered all of the interview questions but you would like to generate a draft of the document. If selected, the document will be compiled without any validation. There will be unanswered questions in a prototype adoption agreement format, and you will find error messages within the text of a contract format document.


Missing answers
During your interview, you left questions unanswered.
If you leave questions unanswered, your resulting document will not be correct. Please answer the questions marked in red in the interview:
Normal retirement age

Thomson Reuters
AccuDraft
DocsEngine©



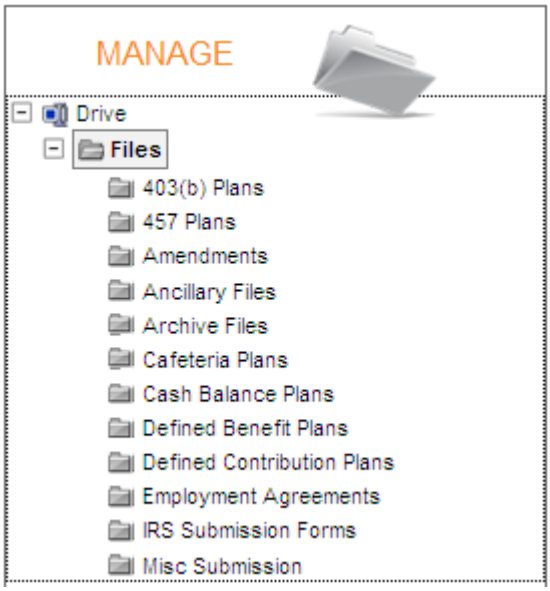
Document Viewing

3.1 Document Home Page

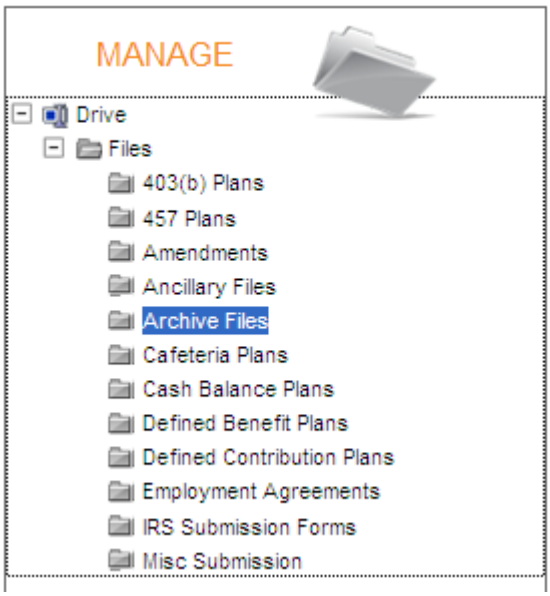
3.1.1 Navigation

In addition to the features discussed in "Main Menu Overview" section of this manual, there are other navigation options that will assist in document management within the DocsEngine© system. A description of the navigation options are described below.

Manage Files: Located on the left of the **Document Home** page you will see a **Manage** box. These folders are where the names of document sets will appear after they are drafted and the tab that they will remain under so long as you wish to have these documents editable. If you have created subfolders, you will see those here as well.

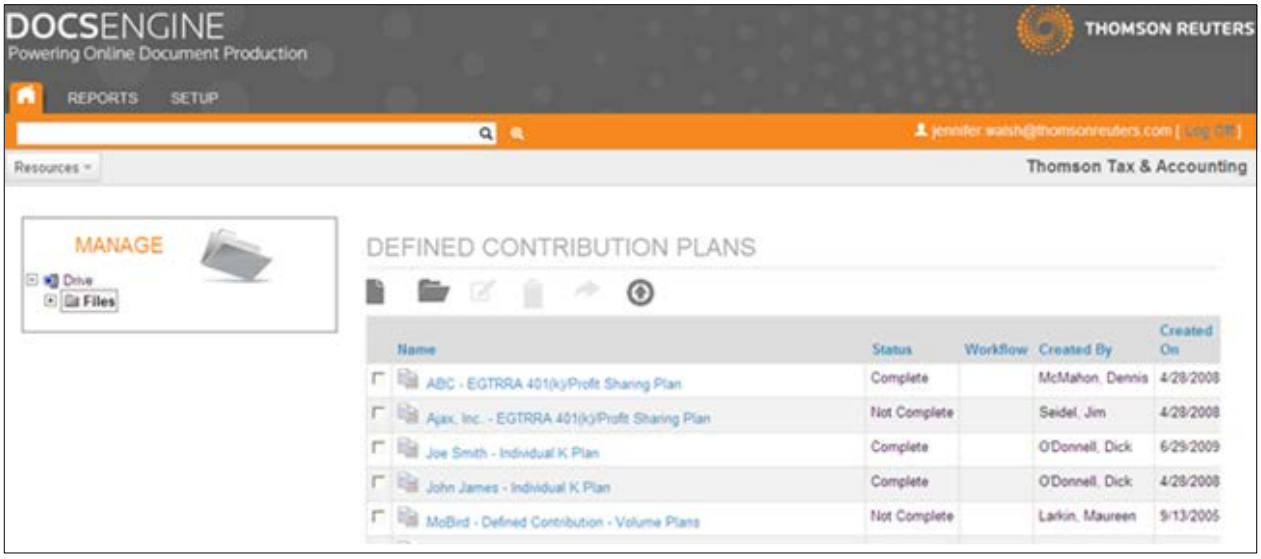


Archived Files: When you select this folder you will be able to see any document set(s) that have been archived or preserved on the system for later use. It is important to remember that these document set(s) are not removed from the system, but placed in a different view for long term storage.



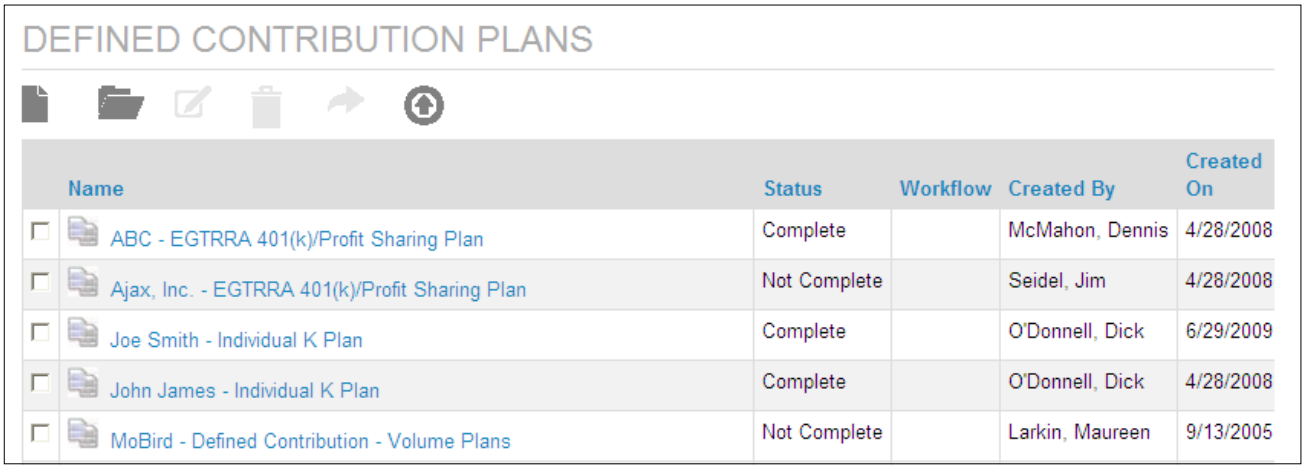
3.1.2 Document Sets: Why You See What You See

You may notice that you see only the document sets you created, or if this is the first time you have logged in you see no document sets. You may also see many documents created by many different people. The document sets that you see are dependent on your security level as specified by your System Administrator. At the basic level you will only be able to see document sets that you have created, and consequently, if this is the first time you have logged in, you will see no documents listed on the **Document Home** page. The next security level would let you see not only the document sets that you have created, but also any document sets created by any person in your User Group. A User Group is a group of people categorized together for a specific reason. User Groups and your specific security level will be determined and administered by your System Administrator.



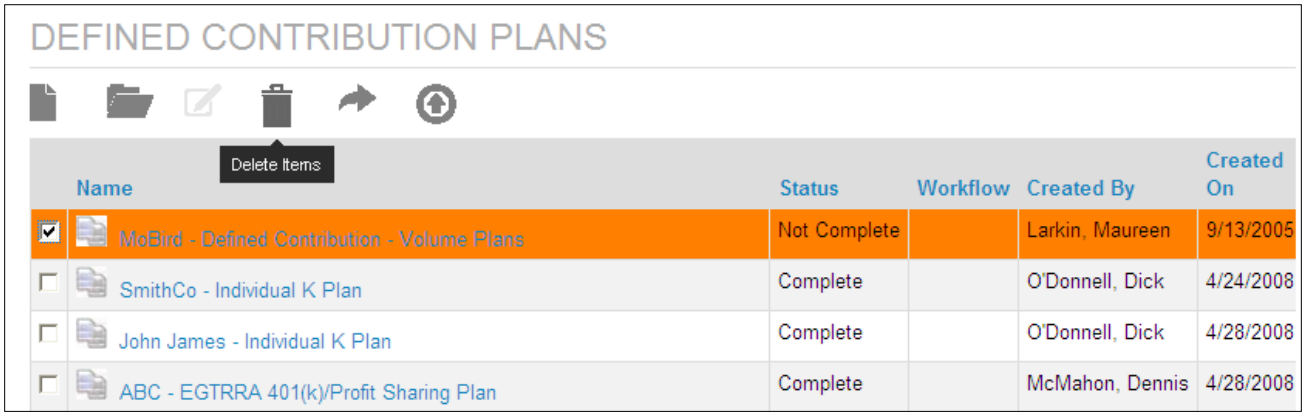
3.1.3 Document Sorting

You have the ability to sort the documents that you see on the **Document Home** page in either ascending or descending order by selecting any of the columns titled Name, Status, Workflow, Created By, and Created On. By default all of the documents are sorted by the date with the most recently created document displayed first. Each time you login to the DocsEngine© system, your documents will re-sort by date. Because there are so many different sorting options, DocsEngine allows you to quickly and effectively view like documents together, which saves you the time and hassle of going through every document on the system.

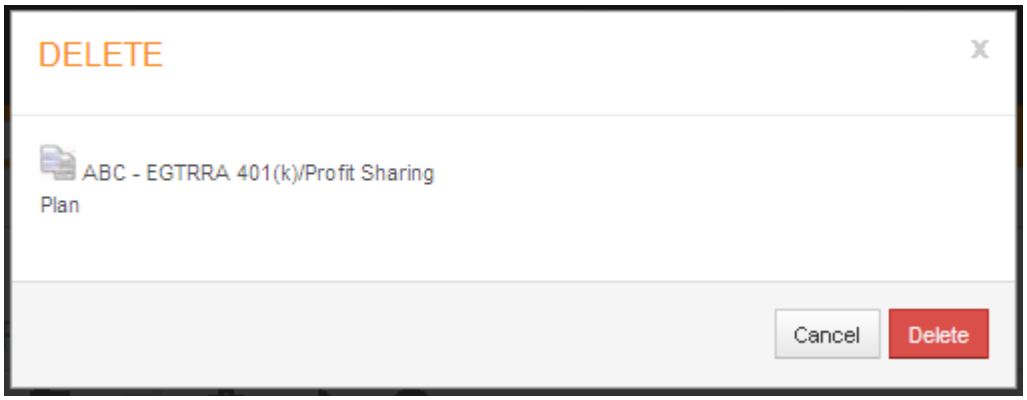


3.1.4 Document Set Removal

You can completely remove and delete a document set by using the **Delete Items** feature. In order to do so, you first need to place a check in the action column box. The action column is the column to the left of the name of your document set. By placing a check in this box, you are notifying the system that you want to do something with that particular document set or sets.



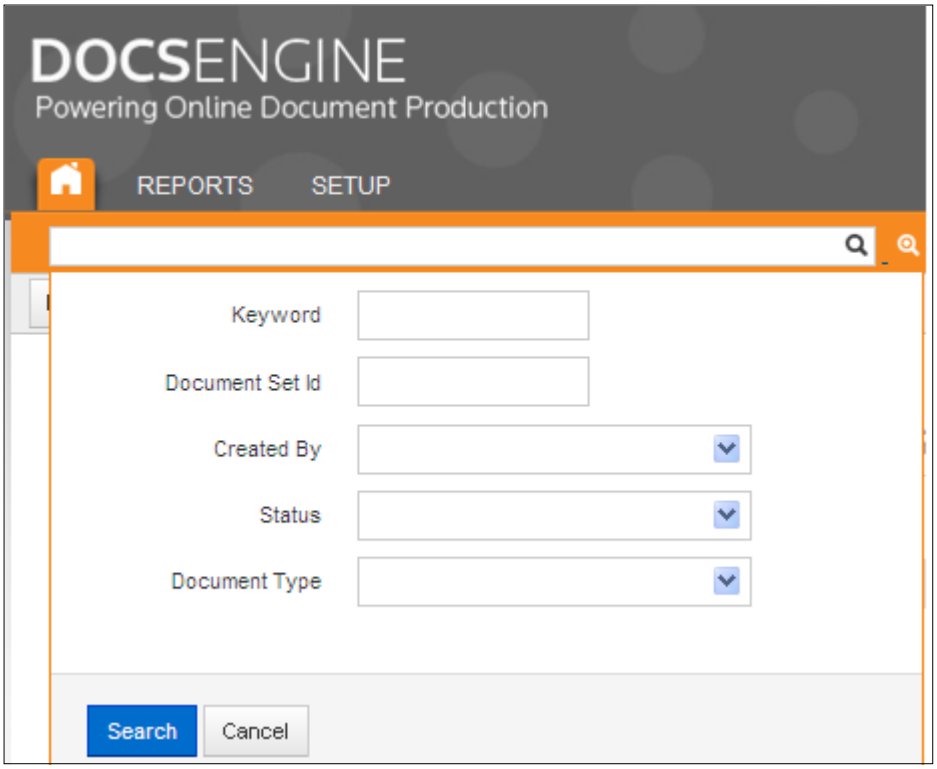
Once you have checked the box, then you need to click on the **Delete Items** icon. A **Delete** box will then appear to verify your action and if you are sure that you want to delete the selected documents, select **Delete**. Otherwise, select **Cancel**.



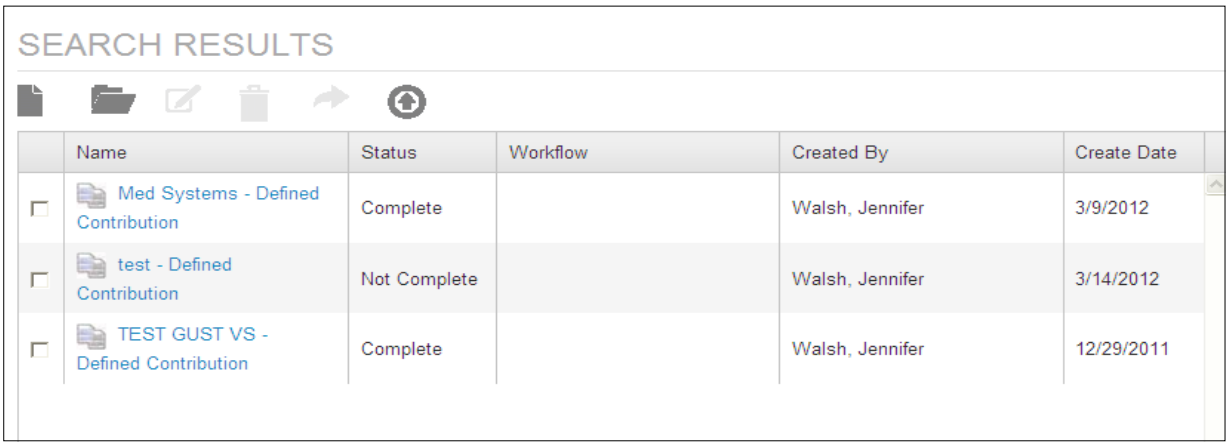
Once you select **Delete**, the checked document sets will be removed from the system. If you need access to that particular document in the future, please contact Thomson Reuters AccuDraft.

3.2 Document Search

The DocsEngine© system has a **Search** feature that gives you the ability to search by keywords in your document sets. You may not need to use this feature if you have a small number of document sets on the system. However, if you have a large number of document sets, you can quickly see how useful this feature is. To complete a document search, click on the **Search** icon below the **Home** icon on the **Document Home** page and then enter your search data.

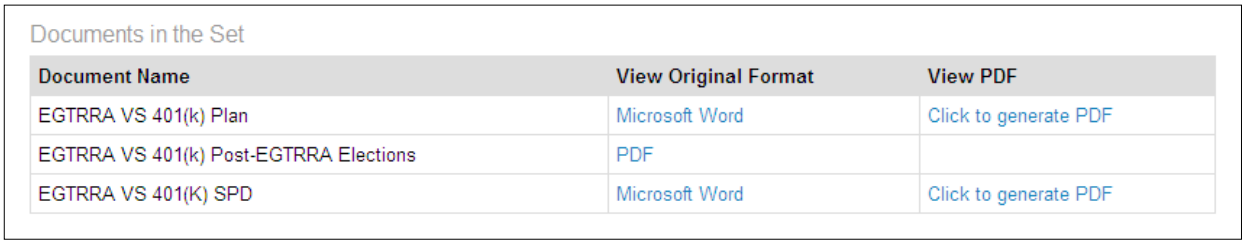


Upon completion of the search the system will automatically close the document search window and display the results on the **Search Results** page. If your document search does not return any results, the system will display No Items Found in the **Document Search** window. To close this window and start another search, select the X in the top right hand corner of the window and repeat the three-step process outlined above.

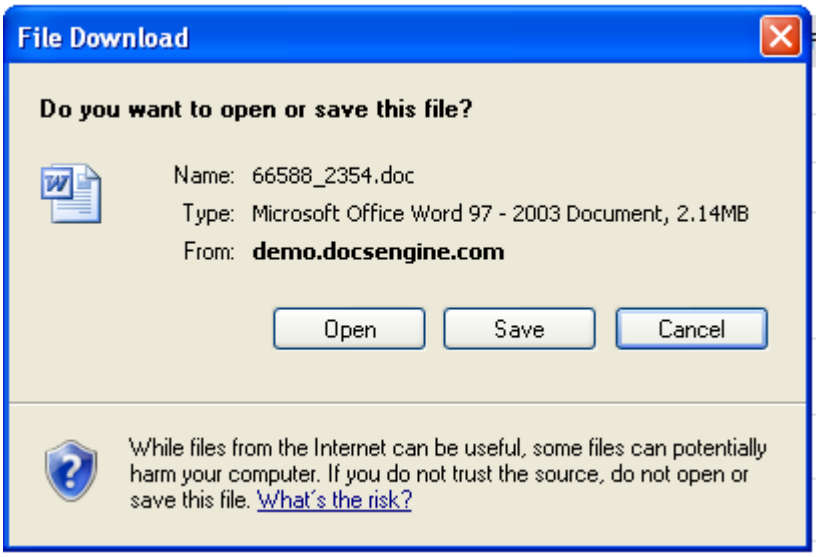


3.3 Viewing Completed Documents

Under Documents in the Set, you will see a link or set of links for each document in your document set. Based on your Security Level as specified by your System Administrator, you will either see a link to access the Microsoft Word (.doc) version of the document and a link to access the Adobe Acrobat (.pdf) version of the document, or you will only see a link to access the Adobe Acrobat (.pdf) version.



When you select the link for the desired document format, a new window will appear that will allow you to either open the assembled document or save a copy of the assembled document to your computer. Repeat this process for each document in your document set and/or for each document in another document set.

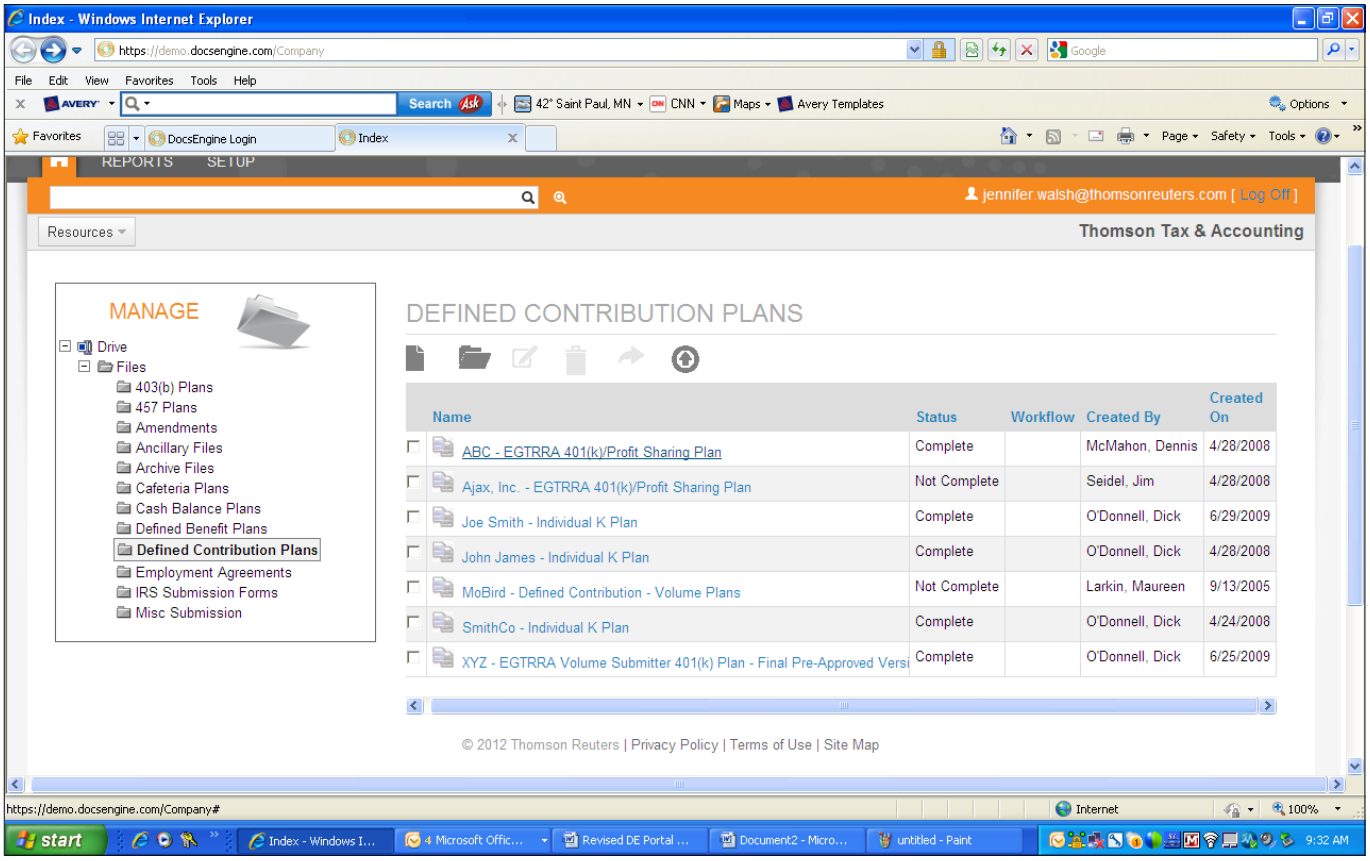

File Download
Do you want to open or save this file?
Name: 66588_2354.doc
Type: Microsoft Office Word 97 - 2003 Document, 2.14MB
From: demo.docsengine.com
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Thomson Reuters
AccuDraft
DocsEngine©

Document Management

4.1 Home Page Details

On the **Document Home** page, the document set names in the **Name** column are hyperlinks. When you click on the link, you will be taken to the document set and **Details** page.

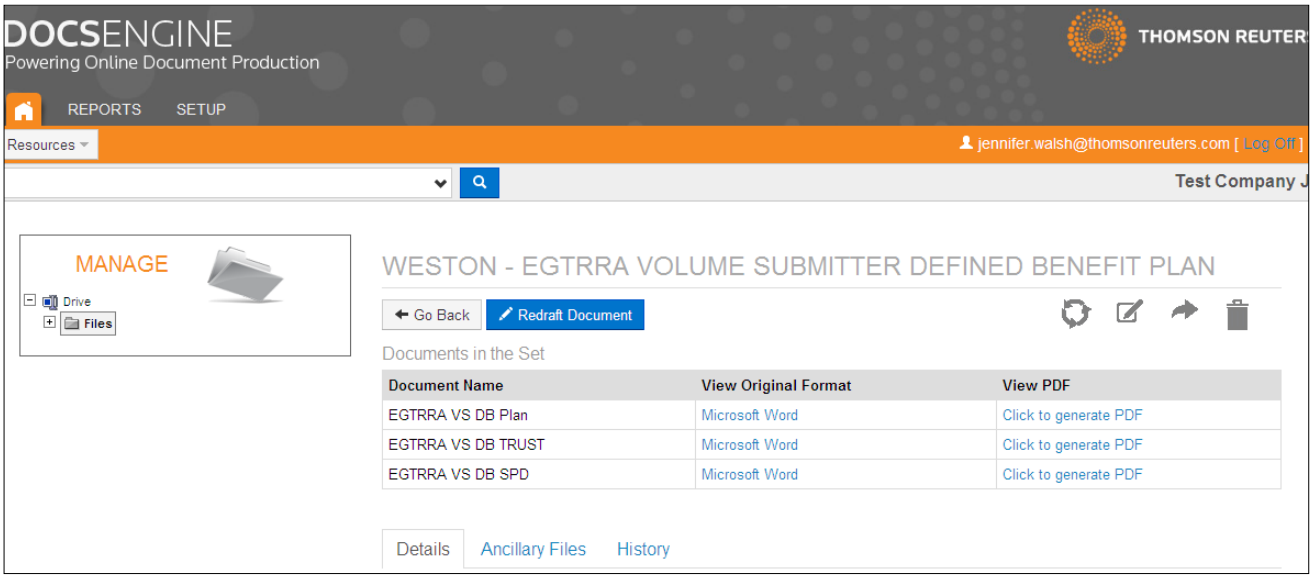


4.2 Documents in the Set

When you open a document set, you will see a heading **Documents in the Set**. Here you will see all of the documents created by your interview. This may include:

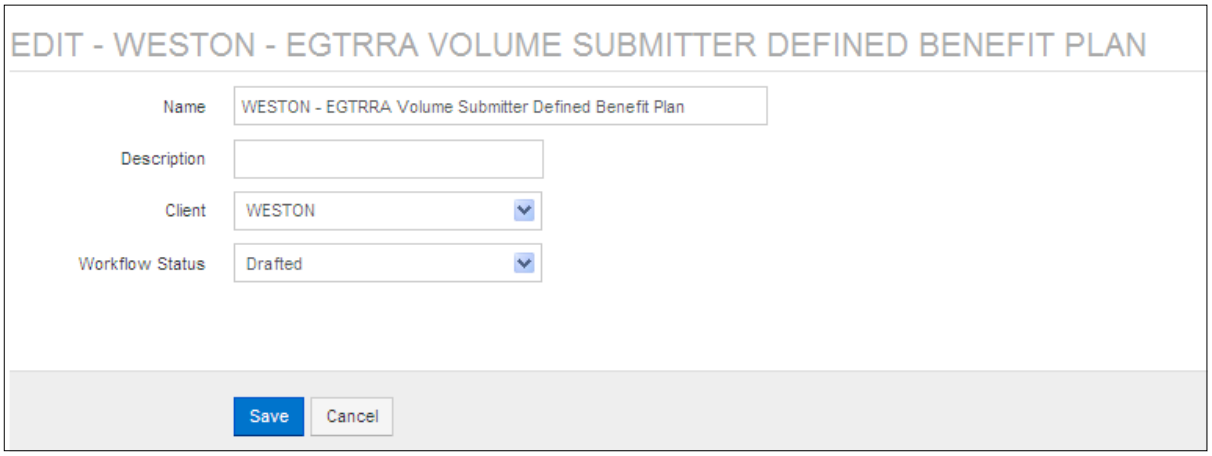
- a plan document
- summary plan description
- ancillary forms
- amendments

There is a link to each document where you can view the document in its original format or create a pdf document.



4.2.1 Edit Document in the Set

Select this icon to change the document name, add a description, select a different client name or update the Workflow Status. (See more on the Workflow Status in Section 4.2.2). Changing the name of the document or any other information DOES NOT affect the content of the assembled document(s) or answer file.



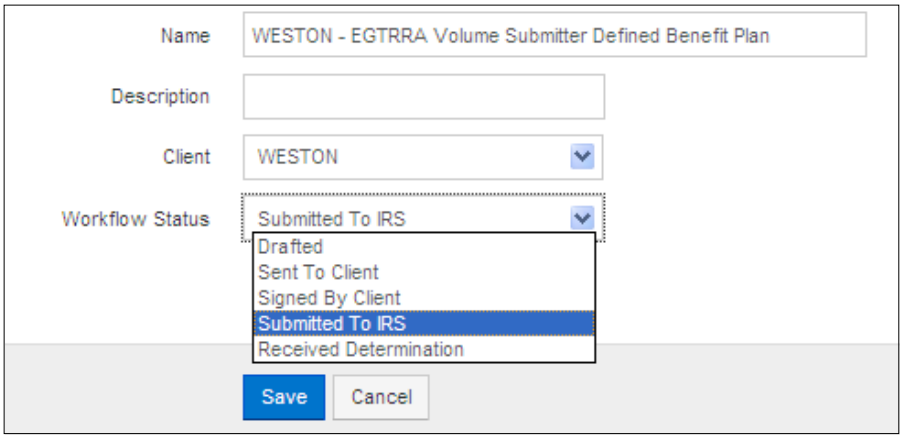
Once you make your changes, save the changes by clicking the blue **Save** button.

4.2.2 Changing Workflow Status

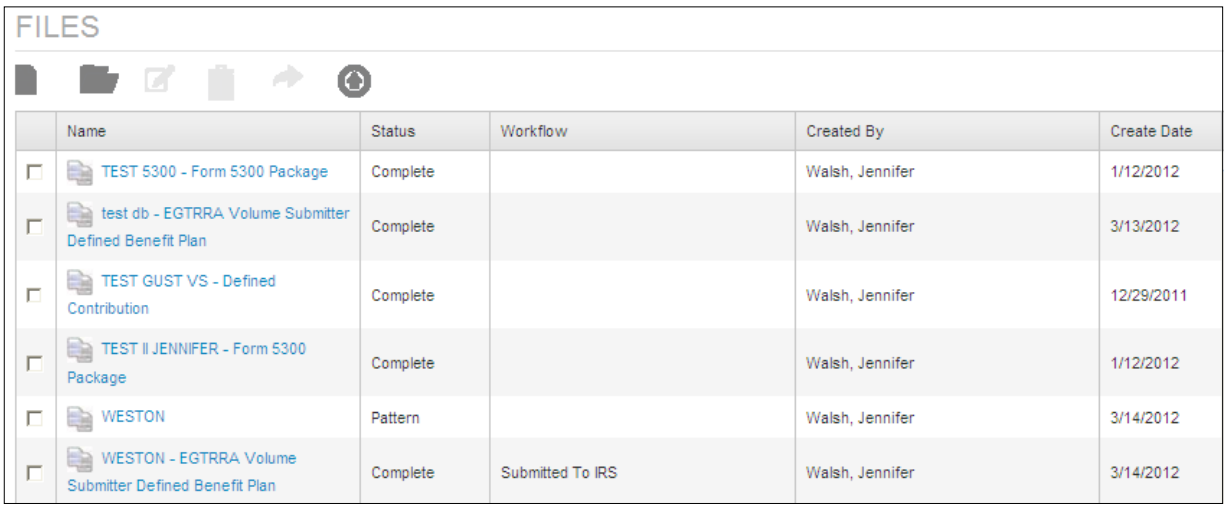
As discussed in Edit Document in the Set, you can change the Workflow Status by clicking on the **Edit** icon. The **Workflow Status** dropdown menu contains a list that identifies the different phases in which a Document Set could currently be—

- Drafted
- Sent to Client
- Signed by Client
- Submitted to IRS
- Received Determination

After you click on the **Edit** icon, the **Edit** window will appear and you can make your selection under the **Workflow Status** dropdown menu. Once you make your selection, save the change by clicking on the blue **Save** button.



The **Edit** window will close after you save your changes. The **Workflow** column on the **Document Home** page will now reflect the current Workflow Status of a particular document set. If no Workflow Status has been specified for that document set, nothing will appear in the **Workflow** column. Keep in mind that it is up to you to change the status throughout the life of the document. The system will NOT change the status automatically each time you modify the document.



Name	Status	Workflow	Created By	Create Date
TEST 5300 - Form 5300 Package	Complete		Walsh, Jennifer	1/12/2012
test db - EGTRRA Volume Submitter Defined Benefit Plan	Complete		Walsh, Jennifer	3/13/2012
TEST GUST VS - Defined Contribution	Complete		Walsh, Jennifer	12/29/2011
TEST II JENNIFER - Form 5300 Package	Complete		Walsh, Jennifer	1/12/2012
WESTON	Pattern		Walsh, Jennifer	3/14/2012
WESTON - EGTRRA Volume Submitter Defined Benefit Plan	Complete	Submitted To IRS	Walsh, Jennifer	3/14/2012

4.2.3 Moving Files on Document Set Page

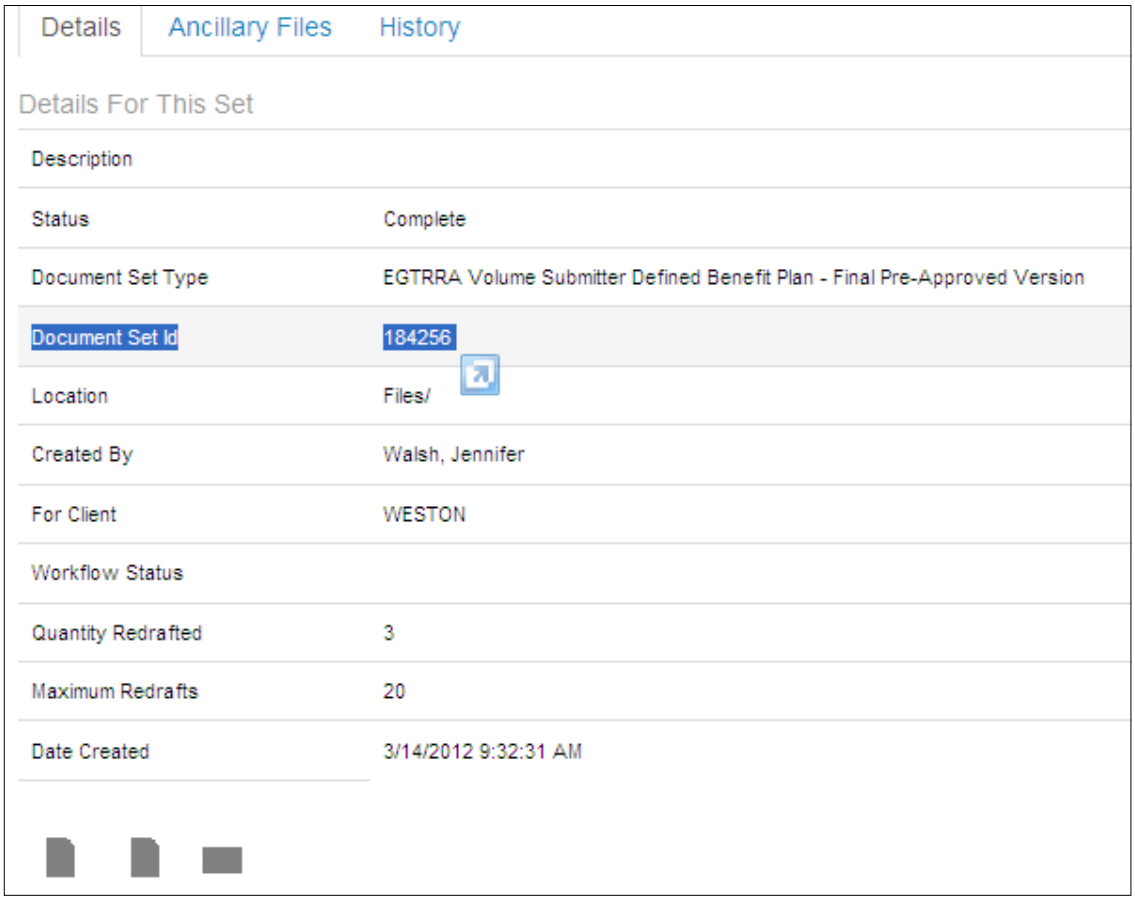
As discussed in Main Menu Overview, you can select the **Move** icon to move a document in and out of folders, and you can do so from the **Document Home** page or the **Document Set** Page.

4.2.4 Deleting Documents on Document Set Page

Select the **Delete** icon to delete a document set from DocsEngine.

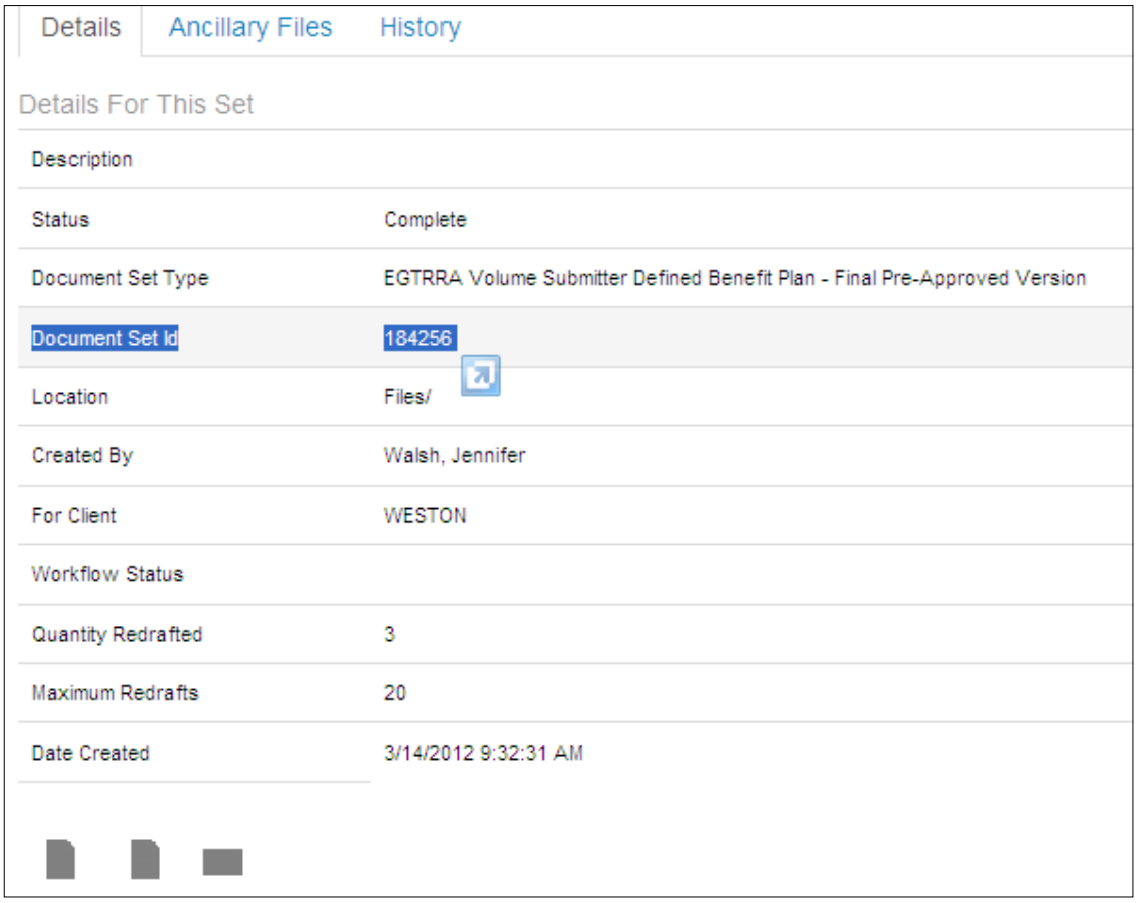
4.3 Details for This Set

Under the Documents in Set, you will see three tabs, **Details, Ancillary Files** and **History**.



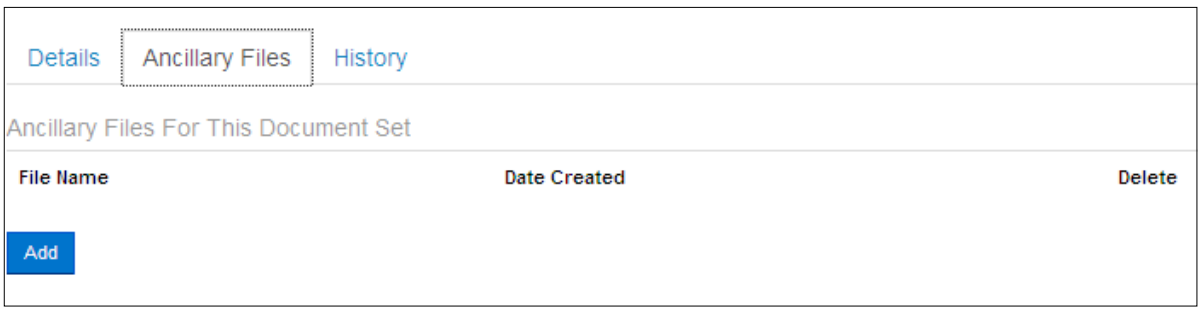
4.3.1 Document Set ID

Under the Details for This Set, you will see the Document Set ID. The Document Set ID is a unique ID that is assigned to each document set when it is created on the DocsEngine system. This ID can be helpful should you ever need to contact Thomson Reuters AccuDraft Technical Support. By supplying your Technical Support Representative with the **Document Set ID,** it will greatly assist him or her in isolating your technical issue and increase the speed at which your issue is resolved.



4.3.2 Ancillary Files

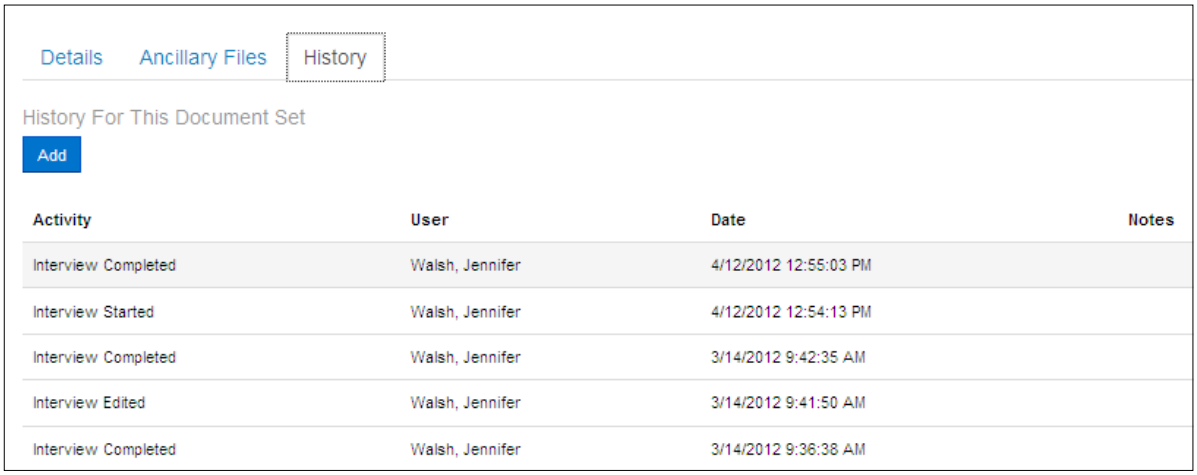
You have the ability to upload ancillary documents from the **Documents in Set** page. As discussed in Chapter II, select this feature to upload outside documentation associated with a document created within DocsEngine.



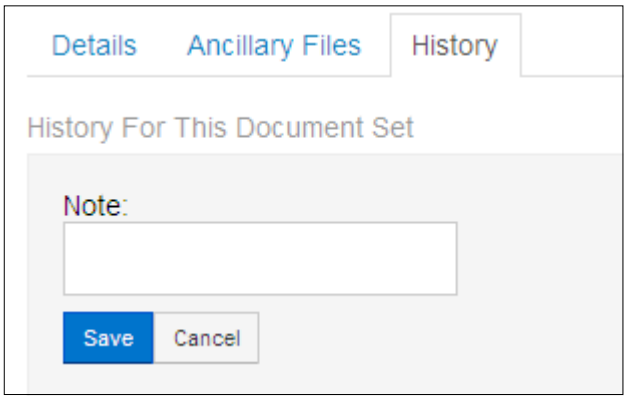
4.3.3 Document History and Notes

DocsEngine automatically records events as they happen with respect to a particular document set. This feature is called the History for This Document Set. The history for a particular document set is broken down into the Activity, User, Date, and Note columns. Some of the different activities that you may see listed are: Interview Started, Interview Edited, Interview Completed, or Note. All of the previously listed activities are system generated with the exception of the Note activity.

The Note activity is a brief message that is entered into the system by the user for communication with other users about this document set.

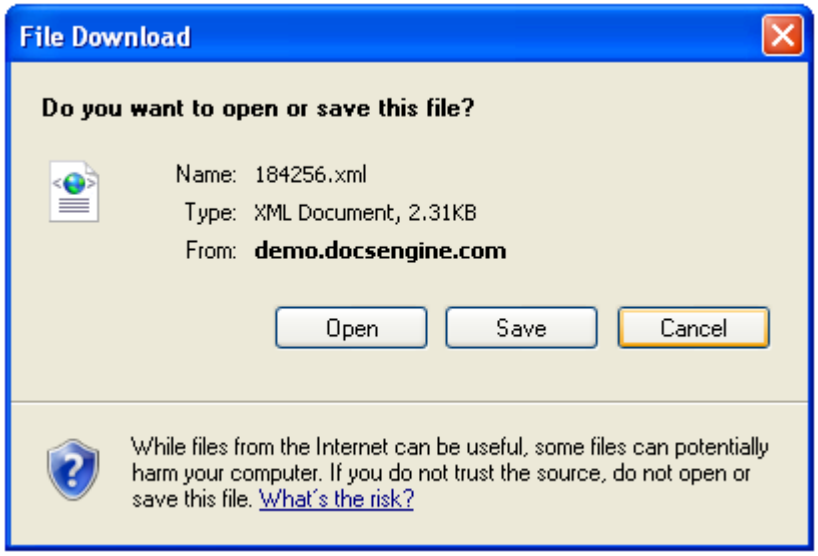


To enter a note into the system, select **Add** and type your message in the **Note** window that appears. Once you have completed your note, select **Save** and your note will be added to the Document History. The system will automatically capture the time and the user who entered the note and display that in the table as well.



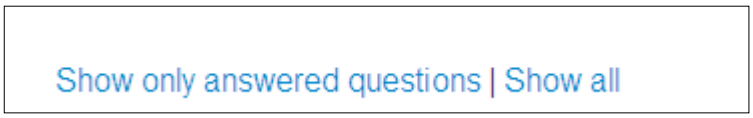
4.3.4 Download Answer File

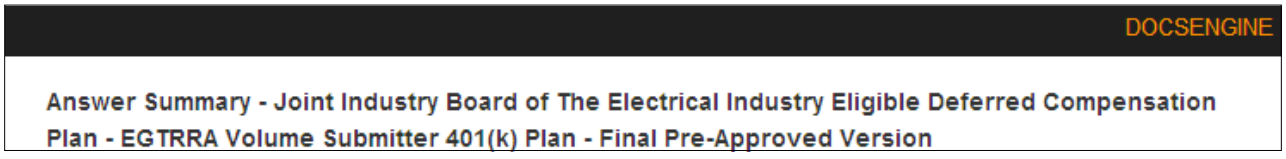
You can download your DocsEngine answer file to your own computer. This is an advanced option and will only be used in the event that you have a version of HotDocs offline or another form of software that is compatible with XML files. To download an answer file, click on the **Download Answer File** icon and you will be prompted to **Open** or **Save** the answer file.


File Download
Do you want to open or save this file?
Name: 184256.xml
Type: XML Document, 2.31KB
From: demo.docsengine.com
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

4.3.5 Answer Summary

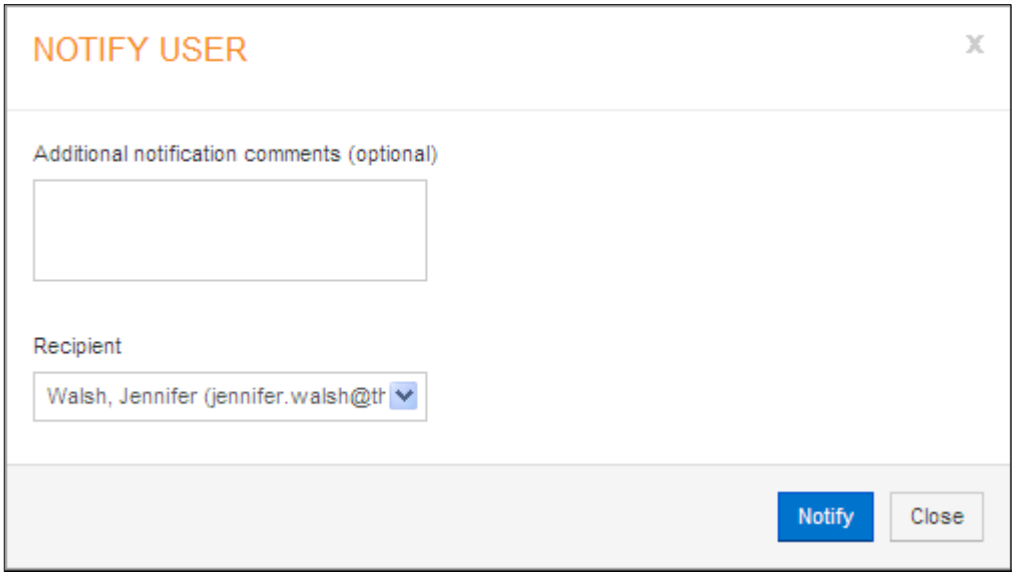
Once you have completed the interview and the documents have been generated, you can create an Answer Summary. The Answer Summary consists of a list of the questions in the interview and your answers to those questions. You can elect to have the list include only the questions in the interview that you answered and are specific to your plan, or you can specify that the list include all questions in the interview as well as the answers to the questions that you did answer. To generate an Answer Summary, click on the **Answer Summary** icon which is located just under the Details for This Set. Two links will appear: **Show only answered questions** and **Show all**.




DOCSENGINE
Answer Summary - Joint Industry Board of The Electrical Industry Eligible Deferred Compensation Plan - EGTRRA Volume Submitter 401(k) Plan - Final Pre-Approved Version

4.3.6 Notify User

Next to the **Answer Summary** icon, you will see a **Notify User** icon. This feature can be used to notify another user via e-mail of the status or other information about this specific document. To use this feature, click on the **Notify User** icon, select a Recipient from the dropdown, and then enter your comments in the box.



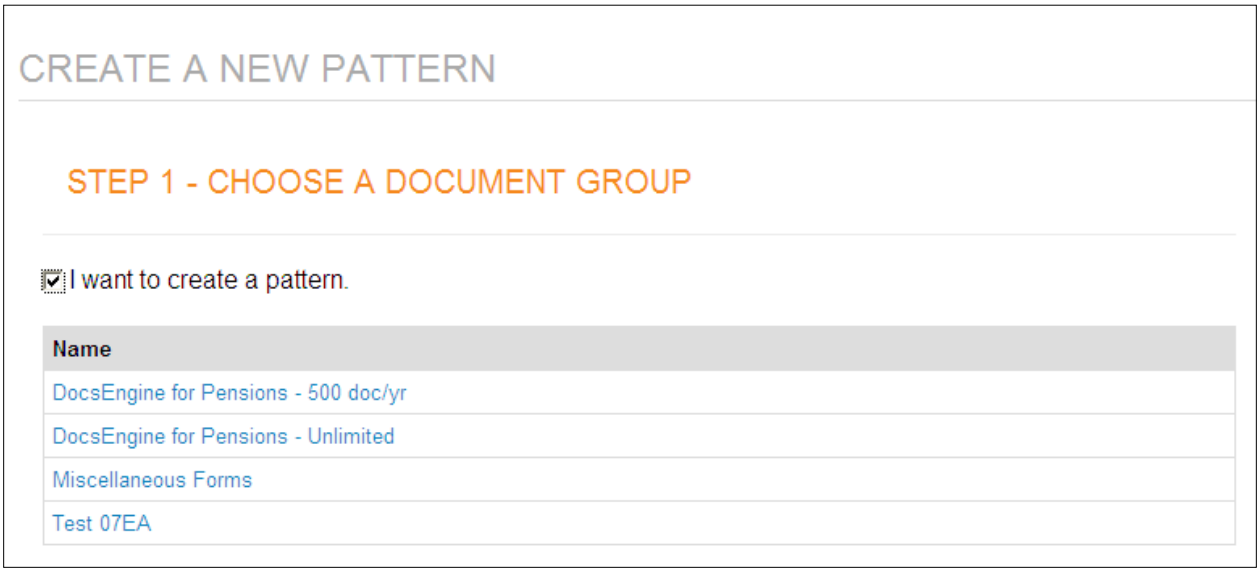
Thomson Reuters
AccuDraft
DocsEngine©

Advanced Document Creation

5.1 Creating Patterns

A pattern is usually created with the intention of answering certain questions in a document interview that will remain constant for a long period of time. You might create a pattern file if you have 100 documents to create and many of the provisions in the documents are common. With a pattern, you can input the common information one time and create your 100 unique documents based off the one single pattern. Each time you choose to create a document using a pattern, any elections that you pre-specified will automatically be merged into the document interview.

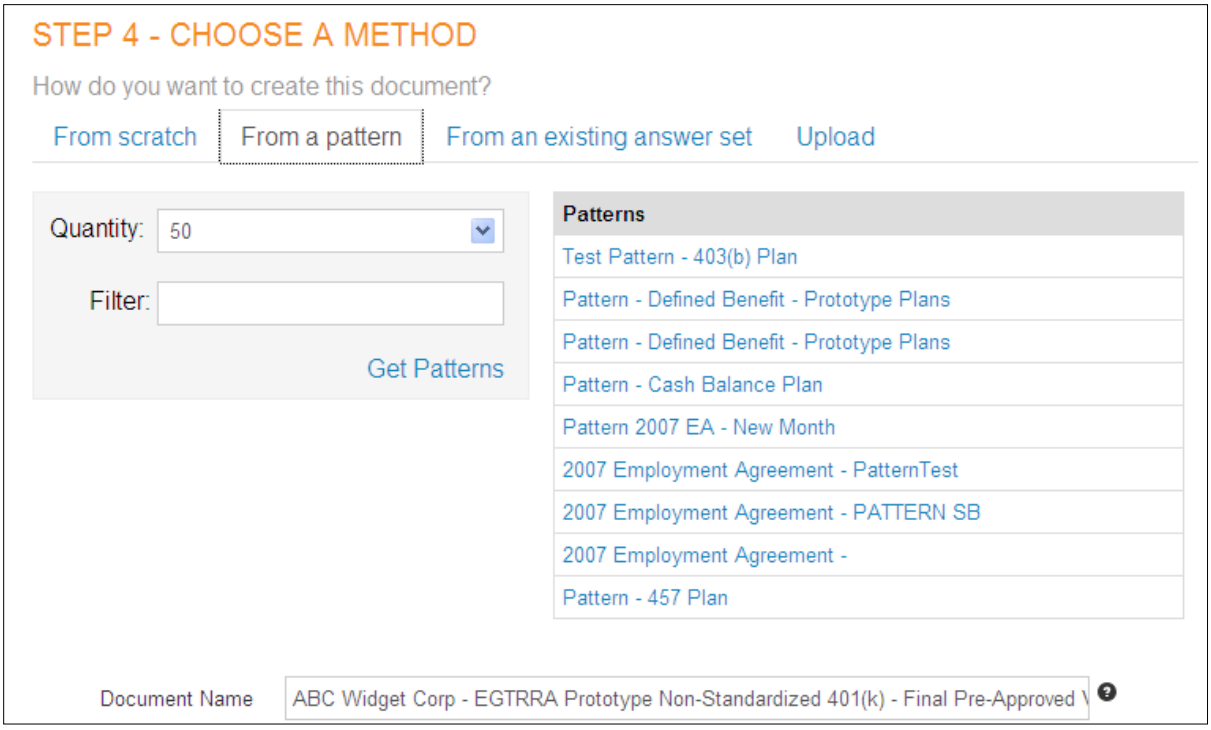
Creation of a pattern is very similar to creating a new document. From the **Document Home** page, select **New Document**. On arriving at Step 1, you will be asked to select a Document Group just as if you were creating a new document. Above the document groups, you will see a box with the words "I want to create a pattern" next to it. After checking this box, you will complete the interview process just as you would if you were creating a new document.


CREATE A NEW PATTERN
STEP 1 - CHOOSE A DOCUMENT GROUP
I want to create a pattern.
Name
DocsEngine for Pensions - 500 doc/yr
DocsEngine for Pensions - Unlimited
Miscellaneous Forms
Test 07EA

The biggest difference between creating a pattern and creating a new document set is that there is NO validation in the pattern interview. When creating a new document set, unless you Submit with Unanswered questions, the system will not allow you to assemble if there are questions that have been left unanswered. In a pattern interview, the system will allow you to Finish with as many or as few answers specified as you wish.

5.2 Creating Documents from a Pattern

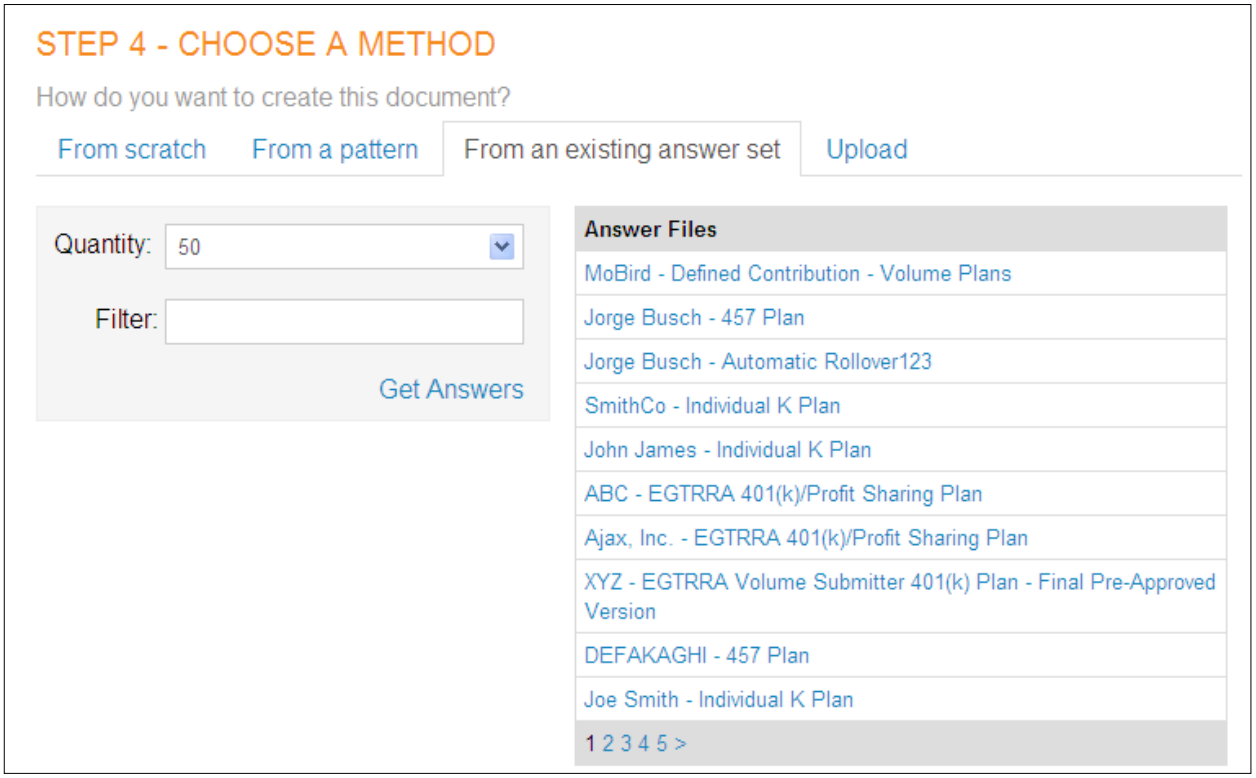
The patterns you create will display on the **Document Home** page along with your document set files, but in the **Status** column, instead of seeing the status of your documents in set, you will see the word Pattern. To create a document using a pattern, select **New Document** and begin supplying the appropriate information as described in the "New Document Creation" chapter of this manual. When you get to Step 4, you will select "**From a Pattern**", select a pattern from the list to the right, and then complete the interview process just as described in "New Document Creation".


STEP 4 - CHOOSE A METHOD
How do you want to create this document?
From scratch
From a pattern
From an existing answer set
Upload
Quantity: 50
Filter:
Get Patterns
Patterns
Test Pattern - 403(b) Plan
Pattern - Defined Benefit - Prototype Plans
Pattern - Defined Benefit - Prototype Plans
Pattern - Cash Balance Plan
Pattern 2007 EA - New Month
2007 Employment Agreement - PatternTest
2007 Employment Agreement - PATTERN SB
2007 Employment Agreement -
Pattern - 457 Plan
Document Name
ABC Widget Corp - EGTRRA Prototype Non-Standardized 401(k) - Final Pre-Approved

5.3 Creating Documents from an Existing Answer Set

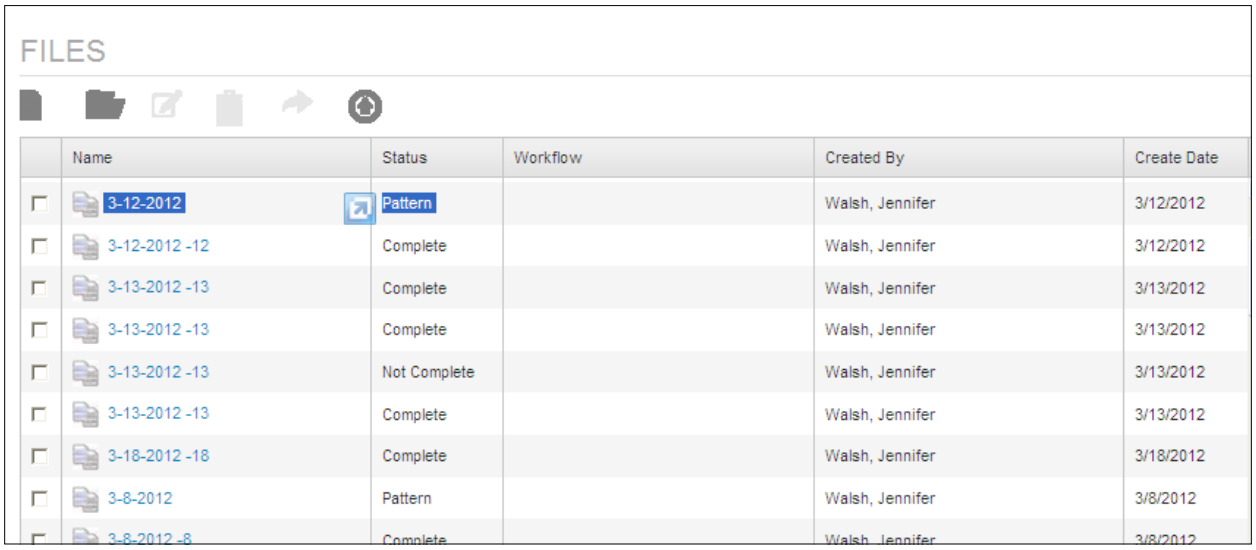
Creating documents from an existing answer set is very similar to the concept of creating documents from a pattern. The difference is that creating documents from an existing answer set means that you are creating this document based on a previously created document instead of a pattern. You might use this feature if you are creating multiple documents for the same client. All of the company information for that client may be the same and you will not have to re-enter that information for subsequent documents. The primary difference between using an existing answer file rather than a pattern is that ALL of the answers in the existing answer file will appear in the interview and only the pre-answered questions in the pattern would appear when using that method.

To create a document using an existing answer set, select **New Document** and begin supplying the appropriate information as described in the "New Document Creation" chapter of this manual. When you get to Step 4, you will select "**From an Existing Answer Set**", select an answer file from the list to the right, and then complete the interview process just as described in "New Document Creation".

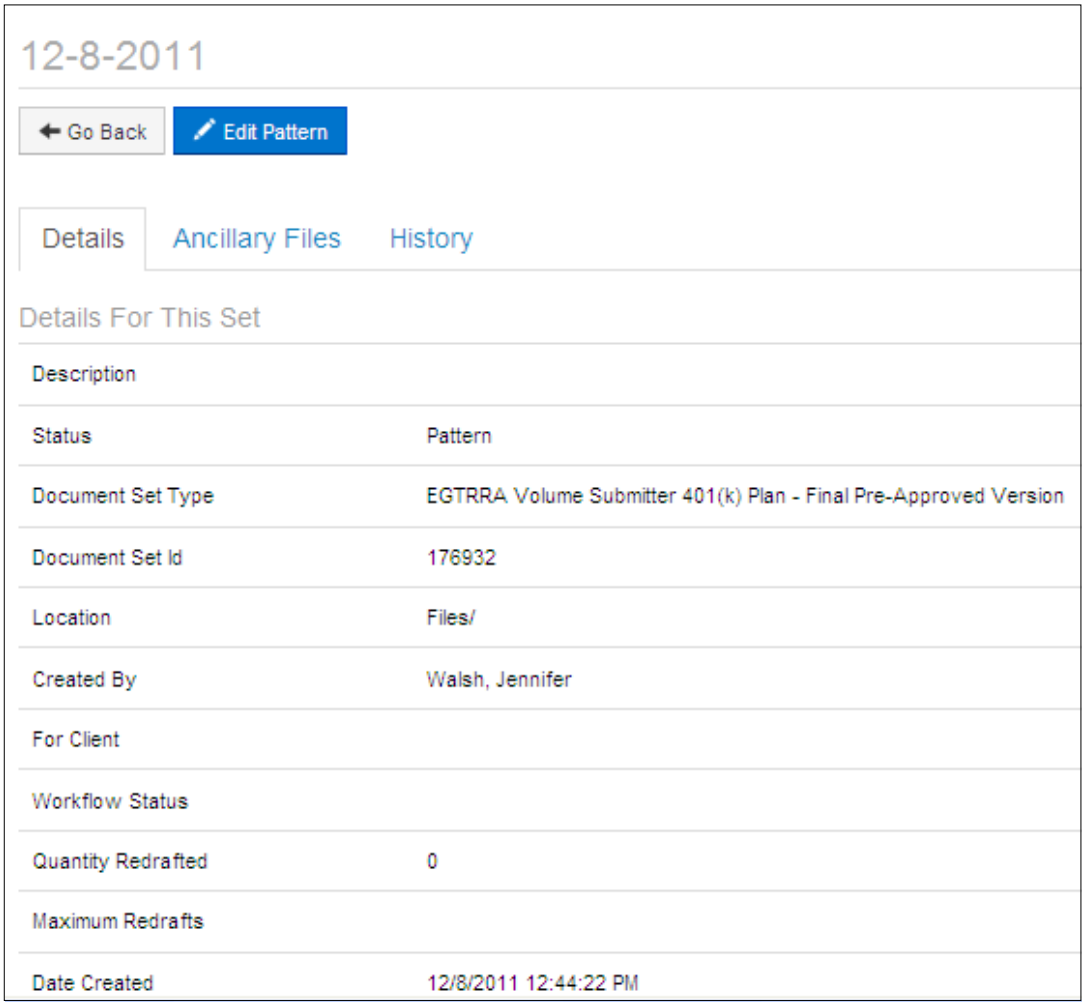

STEP 4 - CHOOSE A METHOD
How do you want to create this document?
From scratch
From a pattern
From an existing answer set
Upload
Quantity: 50
Filter:
Get Answers
Answer Files
MoBird - Defined Contribution - Volume Plans
Jorge Busch - 457 Plan
Jorge Busch - Automatic Rollover123
SmithCo - Individual K Plan
John James - Individual K Plan
ABC - EGTRRA 401(k)/Profit Sharing Plan
Ajax, Inc. - EGTRRA 401(k)/Profit Sharing Plan
XYZ - EGTRRA Volume Submitter 401(k) Plan - Final Pre-Approved Version
DEFAKAGHI - 457 Plan
Joe Smith - Individual K Plan
1 2 3 4 5 >

5.4 Editing Patterns

If you need to change an answer or add more information to an existing pattern, you can do so by first clicking on the name of your pattern, which is a link in the **Name** column of the list of your files on the **Document Home** page.

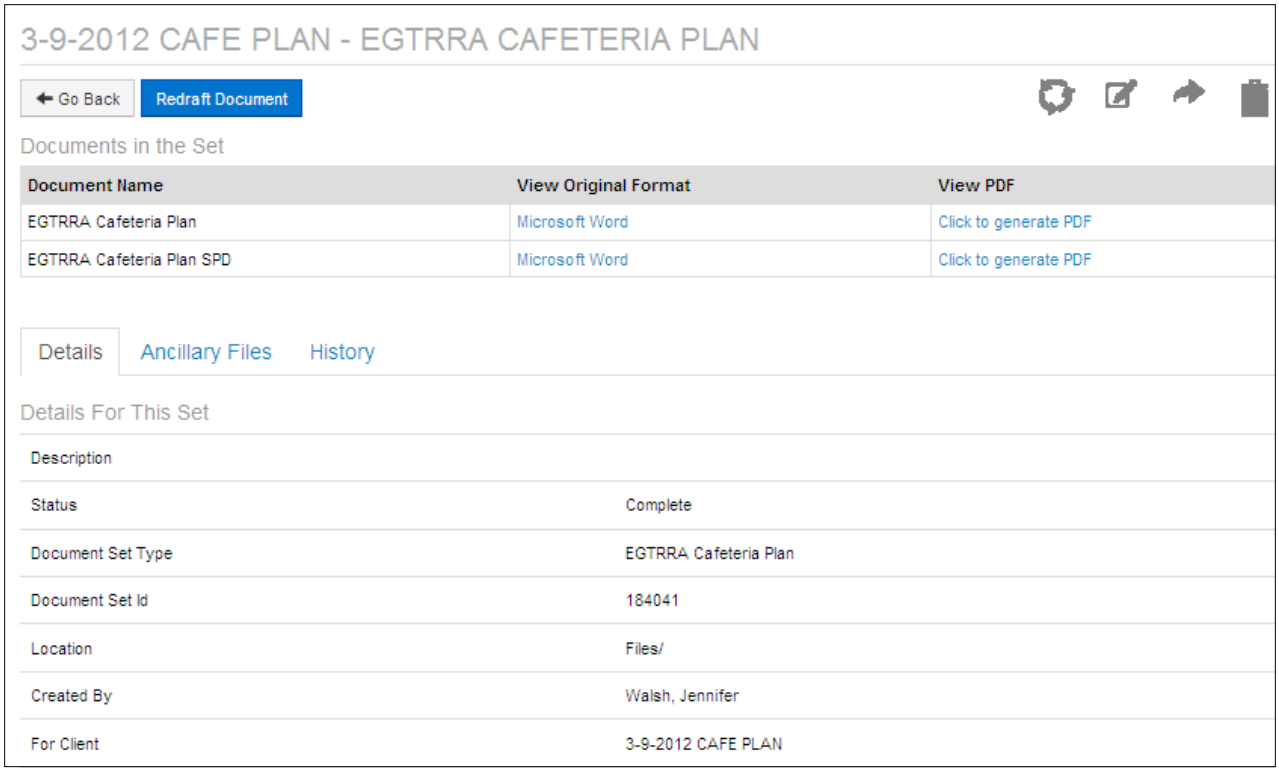


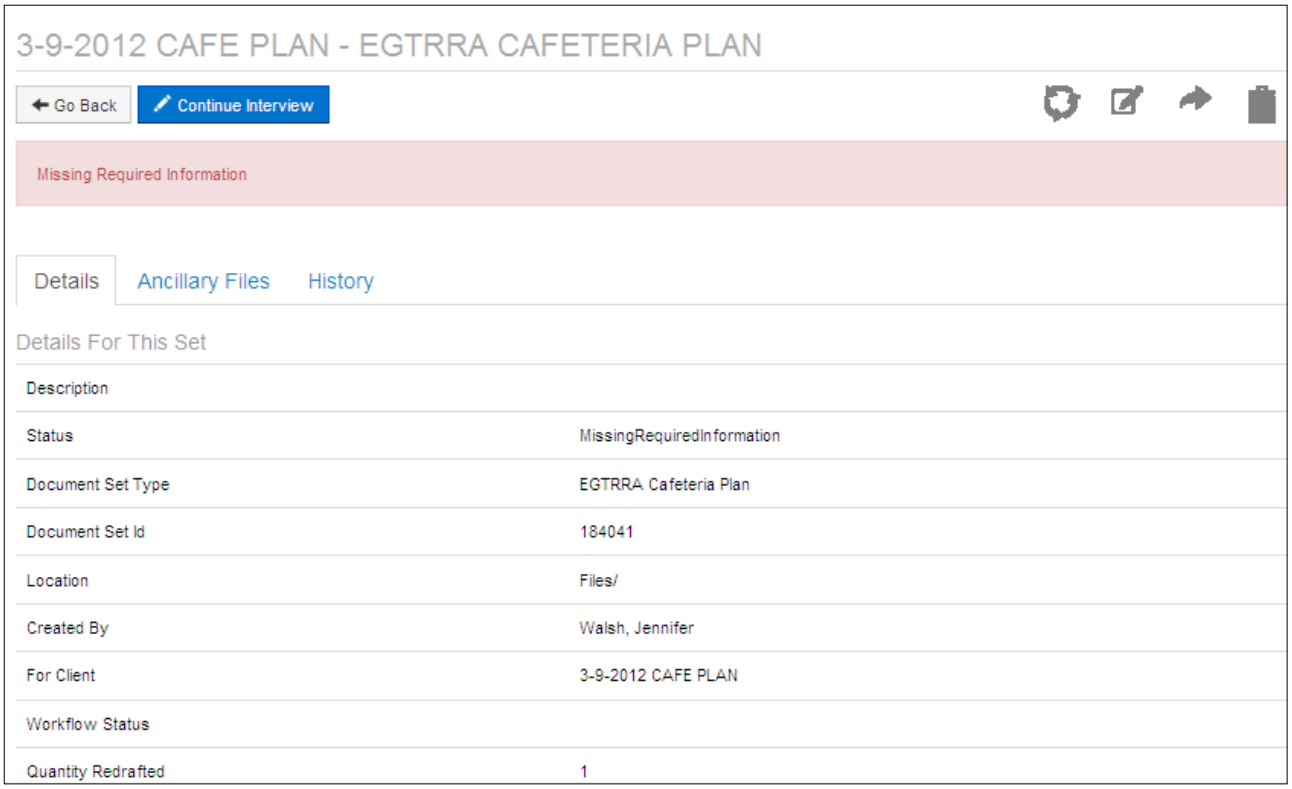
When the next window opens, you will see the **Edit Pattern** button. When you click on the **Edit Pattern** button, the system will load the pattern interview and allow you to make any changes or additions that you deem necessary. Once you are satisfied with the modifications you have made to your pattern, select **Finish** and your changes will be saved. The next time you create a document using this pattern, any modification you made will be reflected in the new document.



5.5 Modifying Existing Document Set(s)

If you need to change an answer or add more information to an existing document, you can do so by first clicking on the name of your document set, which is a link in the **Name** column of the list of your files on the **Document Home** page. Below the document set name you will see either a **Redraft Document** button or a **Continue Interview** button. If the document set has been completed and you have accessed the assembled document(s), the button will say Redraft. If the document set is not complete, the button will say Continue Interview. In either case, to modify the document set, select the button that is directly below the document set name. The system will load the interview and allow you to make any changes or additions that you deem necessary. Once you are satisfied with the modifications you have made, select **Finish**, your changes will be saved, and the assembled document will reflect all of the changes.


3-9-2012 CAFE PLAN - EGTRRA CAFETERIA PLAN
Go Back
Redraft Document
Documents in the Set
Document Name
View Original Format
View PDF
EGTRRA Cafeteria Plan
Microsoft Word
Click to generate PDF
EGTRRA Cafeteria Plan SPD
Microsoft Word
Click to generate PDF
Details
Ancillary Files
History
Details For This Set
Description
Status
Complete
Document Set Type
EGTRRA Cafeteria Plan
Document Set Id
184041
Location
Files/
Created By
Walsh, Jennifer
For Client
3-9-2012 CAFE PLAN


3-9-2012 CAFE PLAN - EGTRRA CAFETERIA PLAN
Go Back
Continue Interview
Missing Required Information
Details
Ancillary Files
History
Details For This Set
Description
Status
MissingRequiredInformation
Document Set Type
EGTRRA Cafeteria Plan
Document Set Id
184041
Location
Files/
Created By
Walsh, Jennifer
For Client
3-9-2012 CAFE PLAN
Workflow Status
Quantity Redrafted
1